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SALES & MARKETING MANAGEMENT

QUALITY

SPECIAL SUPPLEMENT Business-to-Business Selling

SALESMANSHIP A View from the Other Side

KEY MARKET STUDY State of the States: Florida

JUNE 1990
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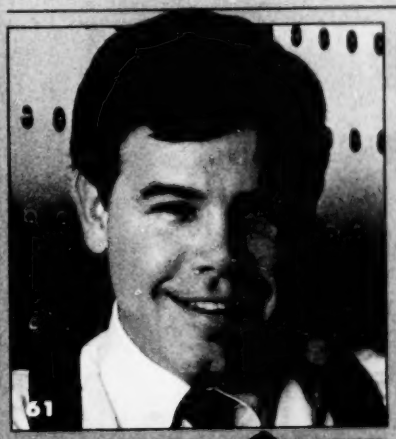
SALES & MARKETING MANAGEMENT



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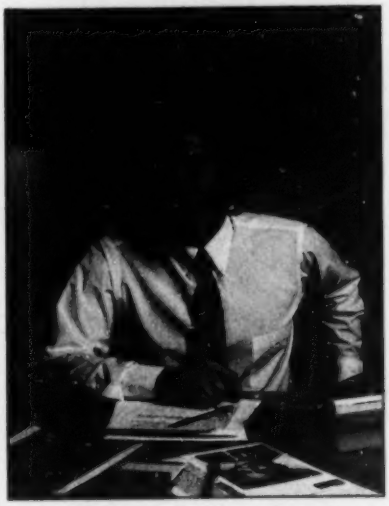
ABP

THE RACE

WHEN ACHIEVEMENT IS THE ISSUE



Last month in this column I offered the opinion that everyone is involved in selling in one way or another. What I failed to mention, however, is that not everybody is equally successful when it comes to this particular line of work.

For those who actually make a living at it, selling involves certain necessary skills. But the thing that ultimately separates the winners from the losers, the wheat from the chaff, the chicken from the egg, the good from the bad and the ugly, a boy from his dog, Tony Orlando from Dawn, and Satchel from Paige—to stretch a metaphor and then beat it to death with a ball peen hammer—is achievement.

It's a word that, although not unique to selling, still turns up with surprising regularity when describing various aspects of the sales function: achieving quota; achieving market penetration; achieving your goals; a record of achievement; achieving success. The list goes on and on.

And on. Which, in a way (and at long last), brings us to this month's issue of *Sales & Marketing Management*, an issue that, if we do say so ourselves, fairly reeks of achievement. First of all, there are the results of our annual Best Sales Force Survey, with six companies garnering top honors this year. For an in-depth look at the winners, as well as the competition itself, I invite you to turn to page 61, where you'll find a collection of stories on the super-achiever sales forces of Communications Satellite, Procter & Gamble, Reynolds Metals, RJR Nabisco, Times Mirror, and United Parcel Service.

Then there's the magazine itself, which contains a number of changes in both editorial content and design. These include an expanded Short Takes section that now encompasses such former departments as Ideas You Can Use, Demographics in Action, Sales Talk, and Best Advice, in addition to a new item called Marketer of the Month. We've also reorganized our slate of departments, doing a little consolidating here, some expanding there, and adding a whole lot of fresh, eye-catching graphics everywhere. For us, these changes (along with others that will debut in subsequent issues) also signify achievement.

As we see it, our mission is to provide readers with solid, useful information, and in that respect we hope these efforts prove successful. But since any good magazine is equal parts content and concept, a certain attention to organization and detail is also essential. As editors, we supply the content—well-written, well-researched copy that successfully imparts the information at hand. Concept, on the other hand, is primarily the domain of the art director and production staff, that nebulous group of overworked, underpaid individuals you'll find lurking around the back hallways of publications, armed with X-acto knives, T squares, and other menacing implements that are for some reason named after letters of the alphabet.

So in keeping with the overall theme of this issue, let's give credit where credit is due: Our new look is largely the result of the stellar efforts of *S&MM* art director Charles Doherty, production manager Joann De Palma, and their collective staffs: Michael Dumycz, Dorothy McFeely, and Judy Brown. To them—and to our latest crop of Best Sales Force award winners—congratulations on a job well done.

TELEMARKETING

THE CIVILIZED WAY TO SAY "@#$%&*!"

The myriad difficulties faced by cold-call telemarketers are well known to those who live and die by the phone: slammed receivers, answering machines, services like Caller-ID or Call-Block, and even proposed legislation that threatens to ban or restrict all unsolicited outbound telemarketing.

Now, salespeople may have yet another hurdle to overcome, one that is in some ways even more maddening than the rest. What is this insidious invention that threatens to put telemarketers on perpetual hold?

It's called the Phone Guard, a simple, inexpensive ($15-$30) gadget that attaches to any telephone, enabling the "callee" to politely rid himself of the unwanted caller without battling the anti-objection tactics of a tenacious salesperson. By simply pressing the pound (#) button and then hanging up, a recording is automatically activated that politely explains that this household (or office) doesn't accept telephone solicitations.

Ironically, Stephen J. Phillips, the inventor of Phone Guard, is a life insurance salesman who has built a successful career around cold calls, and because of this, Phillips is naturally somewhat ambivalent about his invention. "I have the patent," he says, "but I'm not sure what to do with it. This could be a real threat to salespeople who make their living making cold calls."

Nevertheless, Phillips says he can appreciate the consumer's viewpoint. "I recently spent some time at home and was getting two and three calls a night," he says. "It occurred to me that there would be a big market for a device that could help a homeowner get back control of his privacy."

And what about those who might be called upon to sacrifice their jobs in order to protect that privacy? In spite of the fact that Phone Guard has yet to be marketed in earnest, a spokesperson for the Life Insurance Marketing and Research Assn. (LIMRA) refused comment when asked how such a device might impact the industry.

Another area that may be adversely affected by Phone Guard is telephone-based market research. Marty Degraaf, account executive for the Marketing Research Assn. in Chicago, expressed concerns that are no doubt shared by many of her colleagues: "*Can* the device hurt marketing research? Yes. *Will* it have a severe impact? I hope not."

DEMOGRAPHICS IN ACTION

THEY'RE IN THE MONEY: A LOOK AT AMERICA'S AFFLUENT MARKET

While the affluent market has always been of interest to those in sales or marketing, it is especially important today, due not only to its diversity but, more important, to the growing amount of discretionary income and buying power it possesses.

Back in 1983, Mediamark Research's "Upper Deck Report," a demographic and socioeconomic snapshot of the nation's affluent market, defined an "affluent household" (the top 10% of households in the U.S.) as one with a disposable income of over $47,000. By contrast, the most recent report sets the threshold for entry into that top 10% at $62,000, a 32% jump in just six years.

As for what else this report tells us about the affluent market, here are just some of the more interesting highlights:

- 35- to 44-year-olds have the strongest representation within the affluent market, comprising a 26.4% share, while 18- to 24-year-olds make up the smallest percentage, at 15.4%.
- 24.6%, by far the largest percentage, are involved in clerical, sales, or technical positions.
- Nearly half (49.9%) have a total household income between $60,000 and $74,999, the lowest income group represented. The smallest percentage (19.4%) are those with incomes of $100,000 or more.
- 48.6% of all affluent households have two members employed, while 17.9% have three members employed and 12.3% have four or more members employed.
- 70.1% of the affluent population is married, and 52.9% occupy households with three or four persons.
- The census region with the highest representation of affluent households is the South, with 27.9% of the U.S. total.

Perhaps even more important than *who these people are*, however, is the question of *what they buy*. As you might expect, this group seems to enjoy the finer things in life, with theater tickets, personal computers, and imported cars at the top of their "must have" list. On the other hand, they're also like the rest of us in many ways, looking for bargains in stores like K mart and Sears and delving into such all-American pastimes as going to the movies and barbecuing.

In addition, Mediamark says these folks would rather relax with a good domestic table wine or American-brewed beer than any of the higher-priced imports, and they spend more time traveling within the United States than exploring exotic foreign destinations.

All in all, the affluent market would seem to hold a lot of surprises for marketers, and as the table below shows, this growing segment is not always what it seems—particularly in terms of its penchant for purchasing various goods and services. Still, as long as marketing and money go hand in hand (in other words, forever), the affluent market will continue to play an important role in the nation's marketing mix.▶

What the Affluent Consumer Consumes:

Product or Activity	% of Affluent Adults
Products	
Automobiles (foreign)	27.6%
Automobiles (luxury)	6.0
Personal computers	28.2
Beer (domestic)	45.5
Beer (imported)	22.8
Wine (domestic, dinner table)	41.6
Wine (foreign, dinner table)	18.7
Activities	
Barbecuing	46.3
Shopping at K mart	47.5
Shopping at Sears	44.6
Movie attendance (in last 90 days)	62.0
Theater attendance (in last 12 months)	24.2
Domestic travel (in last 12 months)	72.8
Foreign travel (in last 3 years)	34.2

SOURCE: Mediamark Research, *The Upper Deck Report* (Fall 1989).

AMERICA'S BEST SALES FORCES: SIX AT THE SUMMIT

The results of our annual survey spotlighting the selling efforts of six companies ranked at the top of their respective fields.

BY WILLIAM KEENAN JR., MANAGING EDITOR

Over the years, the word "teamwork" has typically been used to describe the efforts of those who work behind the scenes in sales, while the sale itself remained a matter of individual achievement. In today's more sophisticated and competitive environment, teamwork has been replaced by "team selling"—which in turn has become the standard for sales success in any number of industries.

Nowhere is this trend more obvious than in the list of winners of this year's *Sales & Marketing Management* Best Sales Force Survey, where no fewer than four of the six top-rated companies point to team selling as the key to their success. Some, in fact, have even abandoned individual sales incentives in favor of compensation and reward programs that encourage a team or group effort, a marked departure from the every-man-for-himself approach that used to characterize much of the selling process.

One of these companies, United Parcel Service, this year's winner in the Shipping & Delivery Services category, rewards its total company effort through profit-sharing and a unique management ownership plan rather than through traditional individual sales incentives. Another, Health & Beauty Aids winner Procter & Gamble, has also turned away from individual incentives and is looking into programs that instead recognize team efforts.

And as an indication of just how pervasive team selling has become, even those winners who haven't yet taken on a formal team selling approach—RJR Nabisco and Times Mirror—extol the virtues of old-fashioned teamwork and team support for their salespeople. Basically, the winners agree, you can't reach the top of your industry without it.

A PHOTO FINISH

This year's Best Sales Force Survey competition was hotly contested, with none of the six winners able to post a clean sweep of all seven categories of sales effectiveness (see page 64). Among the reasons most often cited were fierce domestic competition, as well as competition abroad—both in the form of foreign competitors entering U.S. markets and U.S. companies competing, many for the first time, in overseas markets.

This is certainly true of Communications Satellite Corp., winner in the Telecommunications Equipment & Services category. "With U.S. companies needing a real presence abroad, not just a local office, we're facing a growing market in the increasing need for international communications," says Betty Alewine, general manager for Comsat's Intelsat Satellite Services division.

United Parcel Service is another company that stands to gain significantly from expanded international marketing efforts. With both its foreign and domestic land-based business tied closely to fluctuations in the GNP, and faced with increasing competition from new entrants in the package delivery market, the company recently expanded its fleet of airlines and is now poised to enter international markets in a big way.

Global business is also important to companies like Reynolds Metal, which placed first overall in the Metal Manufacturing category this year. Sales of its products outside North America currently amount to 17% of its total revenues, and this figure is expected to grow at a much faster rate than sales in the U.S. and Canada. Reynolds also faces another challenge, one that the company is presently gearing up for: the rapid rate of technological change in many of its biggest markets, areas such as packaging, automobiles, and aircraft.

INTERNAL AFFAIRS

In the consumer industries we surveyed, the main focus this year seems to be more internal—things like merg-

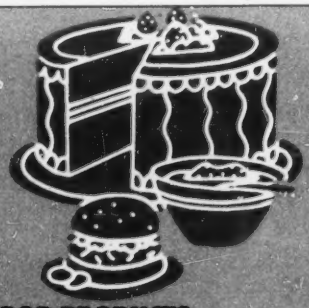
MEET THE WINNERS

The official presentation of S&MM's 1990 Best Sales Force Awards will take place Friday, June 29, at the Waldorf-Astoria Hotel in New York City—at a luncheon co-sponsored by the Sales and Marketing Executives Club of Greater New York. If you're interested in attending, call 212-683-9755.

CHRIS KOPE

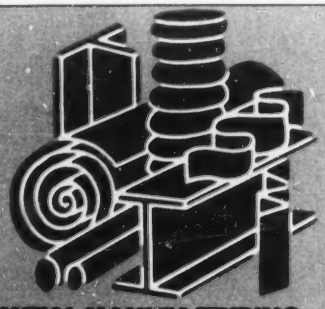
HEALTH & BEAUTY AIDS

COMPANY	SCORE
Procter & Gamble	7.7
Warner-Lambert	7.2
Schering-Plough	7.1
Johnson & Johnson	7.0
Whitehall Laboratories	6.9
Revlon	6.6
Gillette	6.6
Bristol-Myers	6.4
Sterling Drugs	6.3
Chesebrough-Pond's	6.2



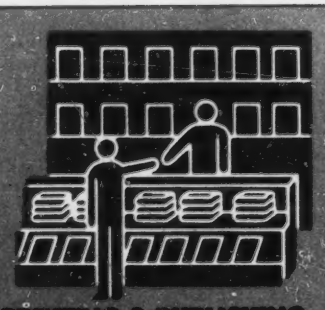
FOOD PRODUCTS

COMPANY	SCORE
RJR Nabisco	7.0
General Mills	6.9
Philip Morris	6.9
Quaker Oats	6.8
Beatrice	6.7
Sara Lee	6.7
Ralston Purina	6.5
Conagra	6.4
Borden	5.9
Pillsbury	5.9



METAL MANUFACTURING

COMPANY	SCORE
Reynolds Metals	7.7
Alcoa	7.6
Amax	7.5
Phelps Dodge	7.1
Inland Steel	6.5
Armco	6.3
Bethlehem Steel	6.2
USX	5.8
National Steel	5.6
LTV	5.4



PRINTING & PUBLISHING

COMPANY	SCORE
Times Mirror	9.0
Time Inc.	8.3
New York Times	8.2
Berkshire Hathaway	7.6
Tribune	7.3
Knight-Ridder	7.2
R.R. Donnelly & Sons	6.8
Gannett	6.7
Dow Jones	6.6
McGraw-Hill	6.2

SHIPPING & DELIVERY SERVICES

COMPANY	SCORE
United Parcel Service	8.2
Federal Express	7.8
Yellow Freight System	6.4
Roadway Express	6.3
Airborne Freight	6.0
Consolidated Freightways	5.9
Alexander & Baldwin	5.5
Emery Air Freight	5.1
Carolina Freight	5.1
American President Cos.	5.0

TELECOMMUNICATIONS EQUIPMENT & SERVICES

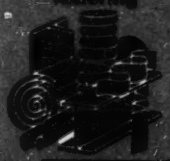
COMPANY	SCORE
Communications Satellite	7.1
Pacific Telecom	6.9
Scientific-Atlanta	6.8
AT&T	6.8
Telecom-USA	6.7
United Telecommunications	6.4
MCI Communications	6.3
McCaw Cellular Communications	5.6
Citizens Utilities	5.1
DSC Communications	4.8

INTERPRETING THE NUMBERS

Survey participants in each industry category were asked to rate the top companies in that category on their effectiveness in seven sales functions (see page 64). Ratings were based on a scale ranging from 1 (poor) to 10 (excellent). The scores represent the average of the seven ratings that each company received.

The Best in Seven Categories of Selling

COMPANIES, FOLLOWED BY SCORES, WITH A HIGHEST POSSIBLE SCORE OF 10.

Industry	Recruiting Top Salespeople	Ability to Keep Top Salespeople	Quality of Training	Opening New Accounts	Holding Accounts	Product/ Technical Knowledge	Reputation Among Customers
Food Products	Philip Morris 7.1	RJR Nabisco 7.1	RJR Nabisco 7.1	RJR Nabisco 6.9	RJR Nabisco 7.1	Philip Morris 7.2	General Mills 7.5
Health & Beauty Aids	Procter & Gamble 7.9	Procter & Gamble 7.5	Procter & Gamble 8.1	Warner-Lambert 7.1	Procter & Gamble 7.8	Procter & Gamble 8.1	Procter & Gamble 8.9
Metal Manufacturing 	Reynolds Metals 8.3	Amax 8.0	Alcoa/ Amax 8.0	Reynolds Metals 7.7	Reynolds Metals 8.0	Alcoa/ Amax 8.0	Amax 8.0
Printing & Publishing	Times Mirror 8.8	New York Times 8.8	Times Mirror/ Knight-Ridder 8.8	Times Mirror 9.0	Times Mirror 9.0	Times Mirror 9.7	Times Mirror 9.7
Shipping & Delivery Services	UPS 7.7	UPS 8.2	UPS 8.4	UPS 7.6	UPS 8.4	UPS 8.7	Federal Express 8.8
Telecommunications Equipment & Services	Telecom-USA 7.2	Scientific-Atlanta/ Telecom-USA 7.0	AT&T 7.9	Communications Systems 8.3	Pacific Telecom 7.4	Communications Satellite 9.0	Telecom-USA 7.4

ers, buyouts, and other market restructurings. Procter & Gamble, for instance, views changing distribution channels as perhaps the most important single issue affecting its business. The increasing variety of new retail outlets (price clubs, discount chains, and hypermarkets, in addition to more traditional outlets like supermarkets and drugstores) is certainly part of this, and, according to P&G's Shelly Zimbler, the company's biggest concern at this point is "making sure we're not offering some undue advantage to one form of distribution over another."

As for mergers, LBOs, and the like, Zimbler says these have also had an effect on the way P&G does business. "An LBO changes the way a store looks at brands," she says. "Obviously, cash flow is very important, and these stores are looking for products they can buy on credit and turn quickly."

Certainly it would be a monumental understatement to say that RJR Nabisco, this year's winner in the Food Products category, was also affected by this particular industry trend. In the course of the last year, the company underwent a major merger and restructuring. When the dust cleared, however, RJR Nabisco was still sitting atop a 44% share of the cookies and biscuits market, due in no small part to a record $2.5 billion in sales. Their first-place showing in this year's survey stands as a testament to RJR Nabisco's commitment to *increase* service to its customers during this period of turmoil, a move designed to both keep customer fears allayed and sales force morale high.

Another industry that didn't have to look far for a challenge last year was Printing & Publishing. With ad sales declining and alternative media multiplying out of control, publishers have been under increasing pressure to discount their rates. Those companies that have successfully held the line in this area—outfits like Times Mirror, our winner in this industry category—have had to scramble to put together multimagazine or multimedia "value added" deals for their clients. And in an industry where, as Times Mirror's Francis Pandolfi puts it, "simple order takers will not survive," his organization is proof that those who do survive must be both flexible and firm to make it through.

So there you have it. Six companies that have achieved sales success in the face of numerous obstacles, challenges that either together or separately may impact your business as well. In the pages that follow, we'll take a closer look at each of this year's winners, examining their strategies, incentive programs, sales philosophies, and other factors that helped make them the best in the eyes of their customers and peers. We'd like to offer these companies our congratulations for a job well done. And for those that came close—in some cases very, very close—we ask you to remember that there's still a lot to be said for both teamwork (the old-fashioned kind) and team selling (its modern-day equivalent). With a bit of luck—and a whole lot of hard work and careful planning—perhaps we'll be telling your story next time around. In the meantime, keep in mind that the advent of the 1990s offers all of us a chance to "renew and review." Or, as Times Mirror's W. Thomas Johnson so succinctly put it: "This could be the most exciting decade that most of us will ever experience . . . one of great opportunity as well as challenge."

HEALTH & BEAUTY AIDS

P&G GIVES ITSELF A MAKEOVER

The company that wrote the book on consumer marketing is now rewriting it.

There was a time, not too long ago, when mighty Procter & Gamble stood atop the marketing heap. Its innovative brand management system was copied by almost every consumer products company in the country. Its advertising expenditures were second to none. And products like Crest toothpaste and Ivory soap were tops with retailers and consumers alike. In this kind of heady environment, a "cold call" was practically unheard of, and it seemed that everyone wanted and needed what a P&G rep had to offer.

On the other hand, not everyone loved P&G. The company's relationship with retailers had been, at best, grudgingly cooperative and, at worst, downright hostile. And while there was no question that P&G salespeople were among the best prepared and that P&G always maintained uniform policies toward the trade, they were also reputed to be arrogant and combative, dictating to retailers what products to stock and how to display them, with little regard

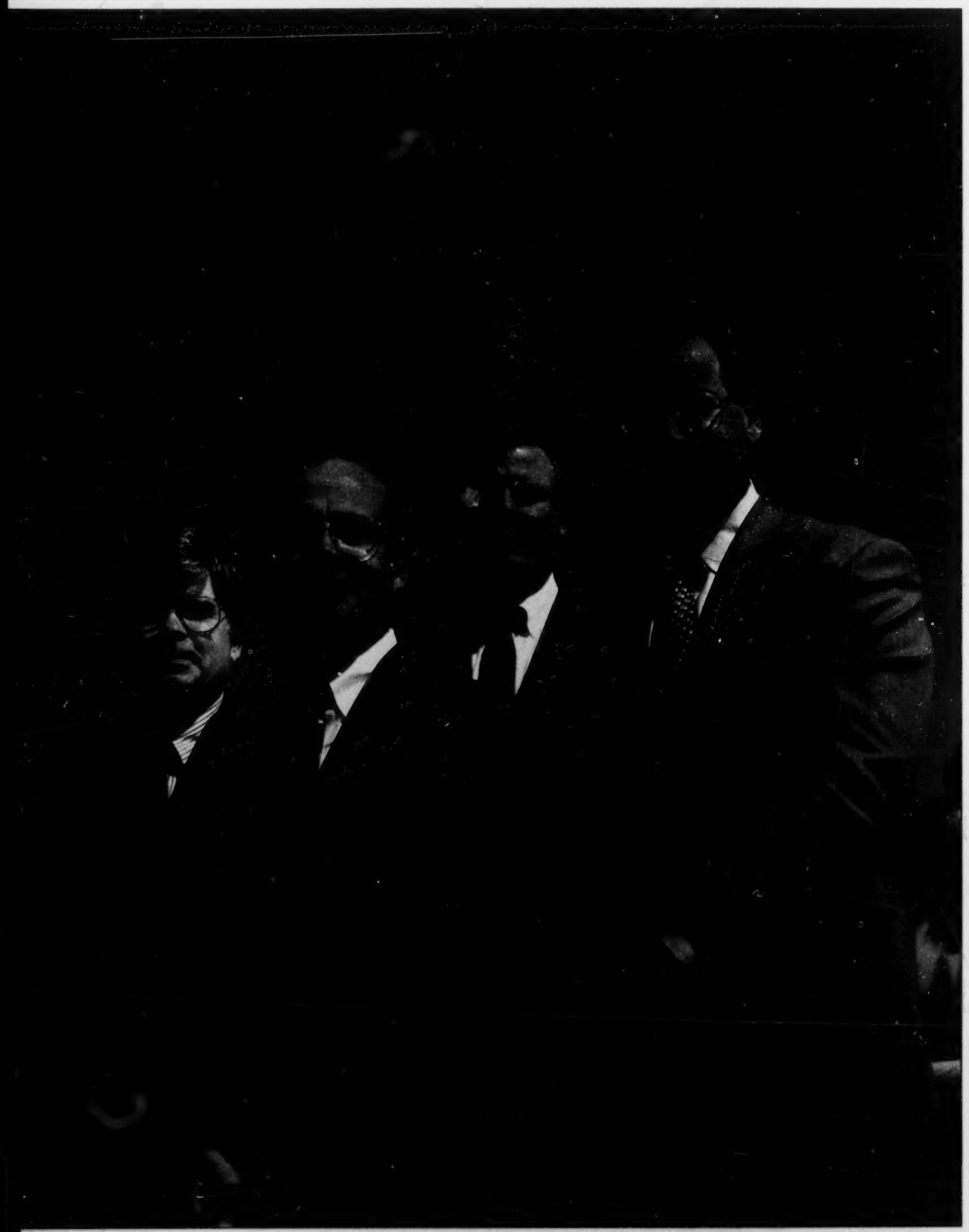
What It Takes to Be the Best

The *Sales & Marketing Management* Best Sales Force Survey rates companies equally on seven different measures of sales force quality—recruiting top salespeople, the ability to keep top salespeople, quality of training, opening new accounts, holding accounts, product/technical knowledge, and reputation among customers.

Of course, some things are more equal than others, as we found out when we asked our six winners if there was one quality or characteristic they valued and stressed above all others. Their answers:

- ***RJR Nabisco (Food Products):*** "Recruiting is the number one priority for us—finding quality people who can analyze data from customers, see things from the consumers' eyes, use available sales tools like laptops and syndicated data, and interface with the marketing people at headquarters."
- ***Procter & Gamble (Health & Beauty Aids):*** "It's hard to separate recruiting top people and keeping top people. It doesn't matter how good your training or products are—if you don't have good people to begin with, you're nowhere."
- ***Reynolds Metals (Metal Manufacturing):*** "Our reputation among customers is most valuable to us. All seven categories are important, but if you've done all the right things to win a good reputation, all the other factors should fall into place."
- ***Times Mirror (Printing & Publishing):*** "Recruiting and holding top people—people are the single most important factor in our success."
- ***United Parcel Service (Shipping & Delivery Services):*** "Our reputation among customers is the factor we value and pride ourselves upon the most."
- ***Communications Satellite Corp. (Telecommunications Equipment & Services):*** "Keeping top people is most important to us. If you can keep your best people, that means you'll be opening new accounts and keeping them, and you're also assured of a good reputation among your customers."

PETER LANGONE/GAMMA-LIAISON



PROFILE

COMPANY

Procter & Gamble Co.

MAJOR PRODUCT OR SERVICE

Laundry and cleaning products, personal care products, food and beverage products

1989 SALES VOLUME

$21.4 billion (health and beauty aids, approximately $3 billion)

APPROXIMATE NUMBER OF SALESPEOPLE

1,300 (in health and beauty aids)

RECOGNITION OF TOP SALESPEOPLE

P&G uses a team selling approach, with finance, transportation, and computer specialists assigned to each account in addition to the salesperson, and offers no individual sales awards. An incentive program for teams may be in the offing.

SALES PHILOSOPHY

"We try to form partnerships with our customers that result in win-win situations."

BIGGEST CHALLENGE IN THE 1990s

"Developing ways to serve new distribution channels such as warehouse club stores, hypermarkets, and drug emporiums, without giving them better deals than traditional outlets."

for what the stores either wanted or needed.

But that was then and this is now.

The new P&G is making a concerted effort to push authority downward, speed up decision making, and get closer to its customers.

"It's a matter of survival," says Shelly Zimbler, general sales manager for health and beauty aids at P&G. "The old way of doing business—good products with good advertising copy—is history. We need to work creatively with customers to find out what they need to move our products. We've moved from a confrontational period of doing business to understanding that five different retailers may have five different ways of selling."

This has required some radical restructuring at the consumer goods giant. For starters, P&G has realigned its brand management into "category selling." Here's how it works: Previously, a supermarket buyer was faced with visits from numerous P&G salespeople pushing different product lines, each with its own promotions and advertising. Now, one salesperson representing all of P&G's health and beauty products calls on a given retailer, thereby streamlining the selling process and doing away with all of the unnecessary clutter and overlap.

And there are other changes as well: Teams of P&G employees from finance, distribution, and manufacturing are assigned to cover the big retailers along with the salesperson. If, for example, a Duane Reade drugstore complains about late shipments, P&G's transportation expert will talk directly to Duane Reade's transportation person, rather than having the salesperson act as a go-between. "It's a much better system, because the salesperson doesn't have the same expertise in these kinds of specialized functions," says Zimbler. "Consequently, it increases the time he or she can spend making the sale."

Which is not to say that P&G has totally abandoned the philosophy that put it on top. The company's personnel management practices, for example, are still pretty much intact, particularly in the area of training, where P&G has perennially been a worldbeater. In fact, the company's training regimen has often been called the boot camp of consumer marketing. "If you can make it at P&G, you can make it anywhere," says Zimbler. "We consider ourselves the pinnacle."

So, it seems, do the respondents to this year's Best Sales Force Survey: P&G placed first in six out of seven categories of sales force quality, and its scores in areas like product/technical knowledge, reputation among customers, and quality of training were far and away the best of any of the 10 companies surveyed.

P&G's training program is a prime example of this commitment to excellence, a commitment based on hard work and individual achievement. New hires are expected to demonstrate speed, accuracy, and creativity; less-than-stellar performers are weeded out quickly. Even established employees continually fine-tune their skills through a program called I.S.D. (Individual Skill Development). Once areas for improvement are identified, the salesperson and his or her manager consult a catalogue of tapes, seminars, and on-the-job training opportunities and chart a course of action. If, for example, a salesperson needs to beef up his or her skills in business math, P&G will train that person individually, rather than have an entire sales division sit through a class that may very well benefit only two or three salespeople.

P&G's recruitment and training mastery is likely to come in handy in the future. As the outlook for the health and beauty aids market darkens, the company will need all the good people it can get. "The rate of growth for packaged goods has slowed dramatically," notes Gary Stibel, founder and chairman of The New England Consulting Group, a packaged-goods consultant in Westport, Conn. "Health and beauty aid companies must now focus on taking market share away from each other rather than participating in category growth. You'll be seeing a collision of Goliaths in the next few years."

When that collision comes, odds are P&G will be ready. Bolstered by key acquisitions such as last September's purchase of Noxell and joint ventures with companies plugged into new distribution networks, the company is confident it will continue to come out on top. After all, Zimbler notes, "It wasn't just bringing out new flavors of Crest that got us from $600 million in sales in the early 1980s to over $3 billion today."—*B.W.*

METAL MANUFACTURING

SELLING WITH THE "REYNOLDS TOUCH"

Having the practiced eye of a former field salesman, Dick Holder always takes a special interest in how Reynolds Metals deals with its customers, although last year one event in particular stood out from all the rest.

After 5 years of concerted team selling—preceded by another 20 of traditional one-on-one sales calls—Reynolds won a contract to provide Campbell Soup Co. with aluminum cans for its tomato juice products.

It took 25 years of persistence and called for a full measure of the technical know-how and friendly persuasion that have given Reynolds a reputation as the top marketing outfit in the aluminum and metals business.

Like many other packaged-food giants, Campbell preferred to make its own cans and had never gone to an outsider. "In this case, they decided to stop making their own and buy them

BOB JONES/GAMMA-LIAISON

Dick Holder attributes Reynolds Metals' shining sales to cross-company teamwork.

PROFILE

COMPANY
Reynolds Metals Company

MAJOR PRODUCT OR SERVICE
Aluminum, packaging, cans

1989 SALES VOLUME
$6.2 billion

APPROXIMATE NUMBER OF SALESPEOPLE
575

RECOGNITION OF TOP SALESPEOPLE
Most divisions present a Salesperson of the Year award.

SALES PHILOSOPHY
"To serve our customers' needs with quality people, providing the highest possible quality products and services."

BIGGEST CHALLENGE OF THE 1990s:
"Keeping pace with rapid change by having every salesperson anticipate changing customer needs."

from us," says the 58-year-old Holder, who rides herd on all 11 Reynolds divisions. As president and chief operating officer, he takes pride in the contribution each division has made to Reynolds's marketing image, whether they're selling aluminum cable to utilities or 80-ft. long "wing skins" to aircraft manufacturers.

To win Campbell as a customer, Reynolds assembled a team of sales and marketing people, graphic designers, and engineers who systematically educated the members of a similar team from Campbell on the virtues of aluminum, a packaging material they'd never used before. Holder himself was in on the first sales "seminar" and attended other critical meetings over the years until the deal was sealed last September. A key element in the sale was the recyclability of aluminum cans, a marketing and PR factor of growing importance for food companies dealing with an increasingly environmentally conscious public.

Coordinating such sales efforts is vital for Holder. Technical breakthroughs made in the Campbell sale, for example, have opened the door for sales to other juice companies. In some cases, marketers from two different parts of the company may converge on the same target. For example, although its can division isn't a leader in supplying the beer and soft-drink industries, Reynolds holds its own by selling aluminum "can sheet" to other manufacturers through a different division. Success in these and other interrelated markets is one reason Reynolds enjoyed its fourth straight year of record profits in 1989 and saw sales soar above $6 billion, even though prices of aluminum ingot, a basic raw material that they manufacture, declined steadily during the year.

Just as recycling has had an impact on the can business, says Holder, environmental factors promise to help Reynolds salespeople as they educate customers in another growth market: transportation. The recently revised Clean Air Act, which will require more antipollution gear in automobiles, has Holder counting on carmakers to buy more aluminum parts to keep total vehicle weight down. In true global style, Reynolds now sells Detroit aluminum wheels and other parts from Europe and has its salespeople hammering away at increasing aluminum's use in engine blocks. In fact, Holder regards salespeople from all his divisions not just as purveyors of product but as knights in the crusade against competing materials. Their notion of chivalry, however, is rooted in listening to the customer. "If they come across anything that could be made of aluminum," he says, "we should find a way to make it happen."

Indeed, the "Reynolds touch" seems to be able to turn just about anything into aluminum. This is figuratively, if not literally, true even in consumer products. So powerful is the magic of the Reynolds Wrap name that the company has begun to lend it to other, non-aluminum household products. For example, Reynolds Plastic Wrap, introduced a few years ago, became so popular that Holder's product-development people worked up colored variants in several different colors that sold quickly when they hit grocery shelves last year.

Even Holder was at first skeptical that green- and rose-colored wraps would sell, but the response of consumers in focus groups was so impressive that he ultimately put the products into distribution without test marketing. Summoning all his powers of understatement, he says, "That's just another example of why it's fun to be here."—*M.E.*

FOOD PRODUCTS

WHEN THE CHIPS WERE DOWN, NABISCO DIDN'T CRUMBLE

What does it take to move *1 billion* pounds of product a year, to control 8 of the top 10 brands in a category, and to produce record sales in spite of a messy LBO?

"Dedication," says Harry Lees, the 44-year-old senior vice president of sales for the Nabisco Biscuit Co. in East Hanover, N.J.

"Our salespeople are dedicated to the customer," says Lees. "They're proud of their job, their product, and their company. I think that's the reason why they've been so adaptive in spite of all the changes the company has been through."

Instead of derailing during the company's recent takeover, which resulted in the creation of RJR Nabisco Inc., Nabisco Biscuit's 4,000-person sales organization responded to uncertainty by keeping their morale high and posting record sales of $2.5 billion. They protected their considerable 44% market share by making sure grocery shelves were stocked with Nabisco's cookie and cracker products, which include Oreos, Fig Newtons, Chips Ahoy!, Ritz Crackers, Wheat Thins, and Triscuits.

But, Lees insists, there's more to selling than just dedication. "One of our primary sales goals is to service the customer," he says, "and in this respect I think we've been exceptional."

Among the things Nabisco does differently from the competition, says Lees, is that it strives to make life easy for the retailer: "First of all, we deliver the product to the back door so they don't have to go through a warehouse. Then, we literally set up the biscuit department. We help our customers pick the best location—even the best aisles and shelves—for the products."

This kind of advice isn't random, notes Lees. It's backed up with a formidable amount of market data and sales statistics, with each salesperson armed with scanners and a detailed knowledge of cross-tabulated demographic information on his or her territory.

"Our salesperson can sit down with a customer and, using a laptop computer, share our information on what that retail outlet's position is in a market, who its customers are, what its average purchase is, and how to create the most effective merchandise mix for that environment."

Lees contends that the results of

ED KEATING

Outstanding customer service and across-the-board decentralization are recognized by Harry Lees as two reasons for Nabisco's success.

PROFILE

COMPANY
Nabisco Biscuit, a subsidiary of RJR Nabisco

MAJOR PRODUCT OR SERVICE
Cookies and crackers

1989 SALES VOLUME
$2.5 billion

APPROXIMATE NUMBER OF SALESPEOPLE
4,000

RECOGNITION OF TOP SALESPEOPLE
Bonuses for all salespeople who make or exceed their objectives (approximately 75% of the sales force).

SALES PHILOSOPHY
"To be a preeminent sales organization that provides quality through consultative selling."

BIGGEST CHALLENGE OF THE 1990s
"Meeting the diversity of consumer needs and identifying new trends in the marketplace, while keeping the core franchises healthy and growing."

this kind of technology-based service do not go unnoticed in the marketplace. "I'm sure," he says, "that one of the reasons we won an award in your Best Sales Force Survey is because of the results we've gotten from using the technology that has become available to us over the past three or four years."

Service is also one of the factors Lees points to when explaining why the company doesn't pay the otherwise ubiquitous (and often exorbitant) slotting fees that grocers charge for shelf space these days. "It's just not our policy," he says. "What's more, we don't need to pay [slotting fees]. Not with our level of attention to the customer."

Another firmly held tenet is that the sales department should be in constant interaction with marketing, something Lees, a former vice president of marketing, characterizes as more than just lip service. "The closeness between departments is one of the reasons I have my job today," he says.

Nabisco's accomplishments in sales should also be noted in context of its across-the-board use of decentralization: Even sales meetings are broken into groups, and instead of employees gathering in one place every year, headquarters goes on the road.

"We feel we can involve more people this way," explains Lees. "We make our presentations to vice presidents and regional managers in each of our six regions. Then, in breakout groups, our strategies and objectives are disseminated to the sales force."

In a further break from standard corporate procedure, Nabisco doesn't recognize its salespeople in the traditional sense. "We don't single out an individual for a trip to Hawaii or anything like that," Lees says. "Instead, salespeople are paid a salary with a bonus tied to specific goals. The more they meet or exceed their goals—and seventy-five percent of the sales force achieves them—the more money they're paid."

This no-frills policy doesn't seem to have damaged Nabisco's relations with its salespeople, however, since our survey shows that one of the areas in which the company scored highest was its ability to keep top salespeople. Add equally high marks in quality of training, holding accounts, and opening new accounts, and you begin to see why Nabisco's sales didn't crumble when the chips were down. —*B.V.*

TELECOMMUNICATIONS EQUIPMENT & SERVICES

COMSAT BEAMS UP THE SALES FORCE

When Betty Alewine became sales and marketing vice president of the Intelsat Satellite Services division of Communications Satellite Corp. in 1987, the division's sales force consisted of just four people. Each, she says, operated pretty much as a loner. The result: Although Comsat enjoyed esteem in its industry as a provider of international satellite services for telecommunications companies and broadcasters, it was a virtual no-show in both sales and marketing activities.

Alewine and top management set out to change that. Instead of the old every-salesman-for-himself approach, Alewine made virtually every employee in the division a partner with the salespeople, offering his or her expertise—technical, promotional, etc.—in making the sale.

"Although we have a relatively small number of direct salespeople, I see our sales force as actually numbering 187—the division's entire work force," Alewine says. "We've instilled a real customer orientation throughout the entire division, not just among the sales force."

Another change: Veteran salespeople and new hires were put through a training program that stressed the basics, including making a presentation, time and territory management, account management, and technical knowledge. Using operations people, a 24-hour-a-day Network Control Center was established to handle customer complaints and instantly deal with their problems.

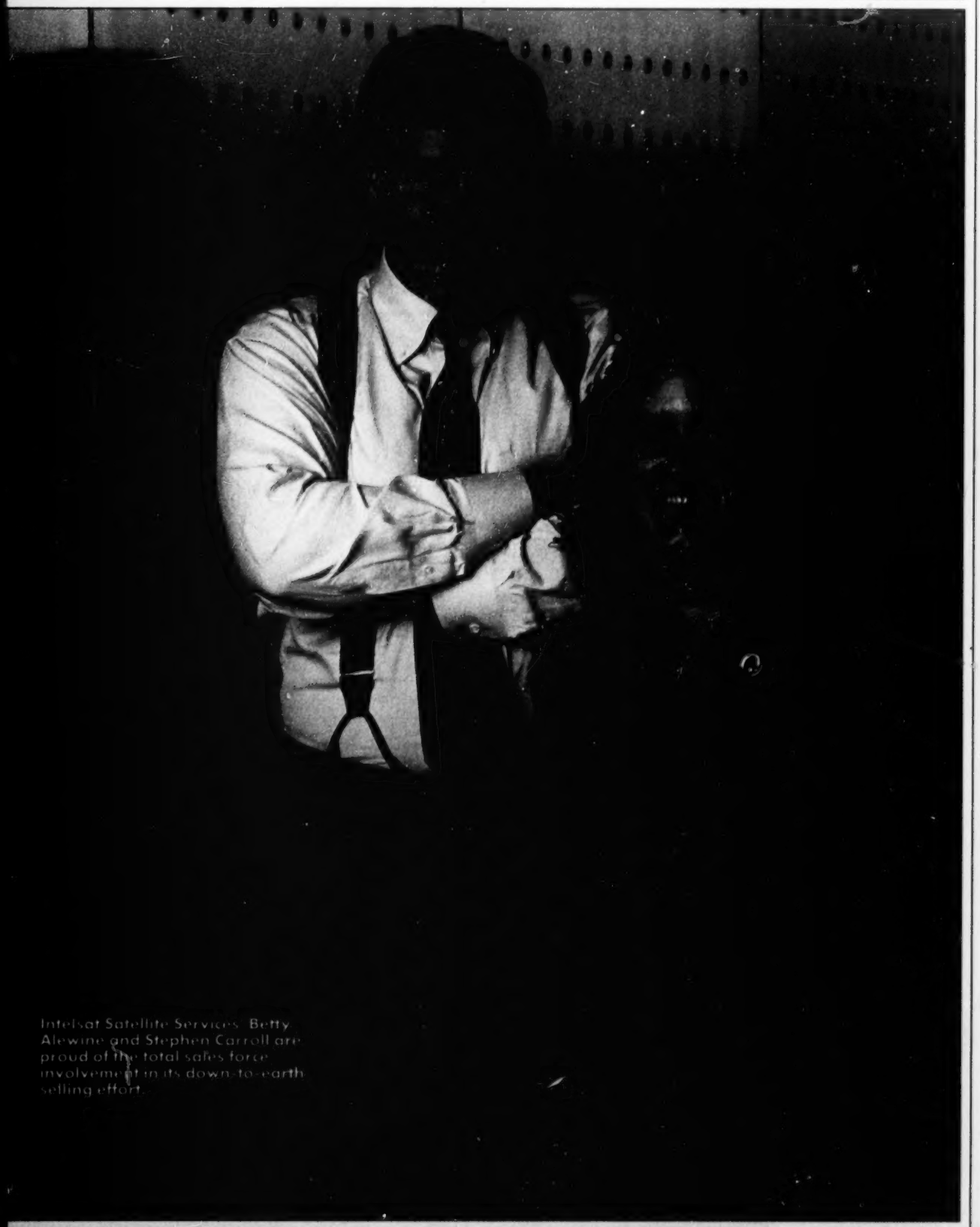
Also, to keep lines of communication open and operating, salespeople were required to meet periodically with each of their accounts, even when a sale was not imminent. Says sales vice president Stephen Carroll, "We limit the number of accounts per salesperson to about seven—any more would take away from the interaction we like between our people and their customers." That interaction, he says, is the key to how the division keeps the new accounts it gains through intensive market research. "Eventually," he says, "the customer thinks of us as an employee of theirs. We have any number of salespeople who are extremely good at doing that."

To give Comsat a larger presence at industry seminars and other events, a speaker's bureau was set up, and the division began sending its salespeople, technical experts, and marketing communications people out to attend more trade shows. In addition, employee motivation was substantially increased via a sales incentive compensation program—something the division had never tried.

Says Alewine, "We started sending our technical people out on calls with salespeople so the salespeople could benefit from expertise one level deeper than they have." Salespeople, she adds, now work closely with marketing communications to produce brochures, technical guides, and other materials that the salespeople give to customers, all so they can "do their own jobs better."

After becoming marketing chief, Alewine continually added to Comsat's sales force, and there are now 25 salespeople (almost half of whom are women) who sell the division's "product"—voice, data, and video services—to companies such as AT&T, MCI, U.S. Sprint, Overseas Telecommunications, Turner Broadcasting, the three major TV networks, and a host of

RHODA BAER/GAMMA-LIAISON



Intelsat Satellite Services' Betty Alewine and Stephen Carroll are proud of the total sales force involvement in its down-to-earth selling effort.

PROFILE

COMPANY
Communications Satellite Corp.

MAJOR PRODUCT OR SERVICE
International satellite services

1989 SALES VOLUME
$200 million

APPROXIMATE NUMBER OF SALESPEOPLE
25

RECOGNITION OF TOP SALESPEOPLE
"We don't rank our people in terms of 'top achiever.' "

SALES PHILOSOPHY
"If you take good care of your customers, and good care of your employees, everything else falls into place."

BIGGEST CHALLENGE OF THE 1990s
"Staying close to our customers. Because of the mergers and acquisitions in our industry, their businesses and requirements are changing. Also, we must stay close to the changing technology in telecommunications."

regional phone companies. Indeed, Alewine's biggest regret last year was that she stayed within a set hiring policy instead of stepping up the program.

Alewine is quick to credit IBM as her inspiration for at least a part of the "new look" at Comsat. "I used to call on IBM when I was in sales," she says, "and I was particularly impressed with its 'Respect for the Individual' program. By individual, IBM means both the customer and the employee. We've tried to follow that philosophy here at Comsat."

Alewine admits that many of the changes she has made since coming on board have been dictated by the need to keep up with events in one of the nation's fasting growing and rapidly changing industries. She describes telecommunications' last three years as "dramatic," specifically noting MCI's acquisition of competitor Telecom USA, a development of no small consequence to Comsat, since MCI is a customer.

"What we've undertaken is meant to let us get—and stay—closer to our customers as they themselves change due to mergers and other trends in the industry," says Alewine (who is now the division's general manager). "Their businesses and requirements will continue to evolve, and we must be able to respond accordingly."

Meanwhile, Alewine is delighted that clients and prospects now associate the word "Comsat" not just with a satellite in the sky but with a salesperson ready to do some down-to-earth selling. —*A.B.*

PRINTING & PUBLISHING

TIMES MIRROR: BIGGER, BETTER, AND MORE INNOVATIVE

In an industry of media empires—Hearst, Murdoch, and Maxwell are a few that come to mind—the Times Mirror Company stands out as an exceptionally well-managed, innovative, and profitable entity.

The core strength of our 1990 winner in the Printing & Publishing category lies in its ownership of newspapers like the *Los Angeles Times*, *Newsday*, the *Hartford Courant*, and the *Baltimore Sun*. But attractive profit and growth opportunities also exist in other areas, particularly Times Mirror Magazines (*Field & Stream*, *Popular Science*, *Outdoor Life*, and *Home Mechanix*, to name a few).

Still, it's not all chocolate and roses, even for the top media megacorporations. According to Francis Pandolfi, president of the Times Mirror magazine division, rate negotiations continue to be one of the main sticking points in the industry. "Agencies are negotiating with print media to come up with prices that are less than what rate cards call for," he says.

Executive vice president Jim Kopper adds that "we have to take the necessary precautions, since this trend is something we don't seem to have any control over."

The response to this trend, which is being instituted throughout all relevant divisions of Times Mirror, is what Pandolfi terms "multimedia sales . . . where all the Times Mirror companies that sell advertising sell multimedia marketing situations to our customers, enabling us to put the power and value of all our media to work in a particular situation for a client."

For instance, a recent "Home Remodeling" promotion that covered the total remodeling of a home near Atlanta was offered to the readers of *Popular Science* in three separate special monthly editorial sections. There was also a sweepstakes that offered readers the chance to win the home, as well as hardware store tie-ins. Another promotion, keyed via a special section in *Golf* magazine, hailed the U.S. centennial of golf and, among other events, included a TV program hosted by Vin Scully and a heavily promoted black-tie dinner attended by such links legends as Arnold Palmer and Ben Hogan.

"Comprehensive programs like these are essential if we're sincere about offering our advertisers expanded opportunities and programs for the nineties," Kopper says.

Neither Pandolfi nor Kopper were all that surprised at Times Mirror's winning our Best Sales Force award in its category, attributing their success to their employees. "People are the single most important factor here at Times Mirror Magazines," Pandolfi says. "We've worked awfully hard to make this an environment where people want to stay and others want to enter."

As part of their investment in those people, Pandolfi and Kopper put their salespeople through a three-year training program, and offer salary and incentive programs based on performance.

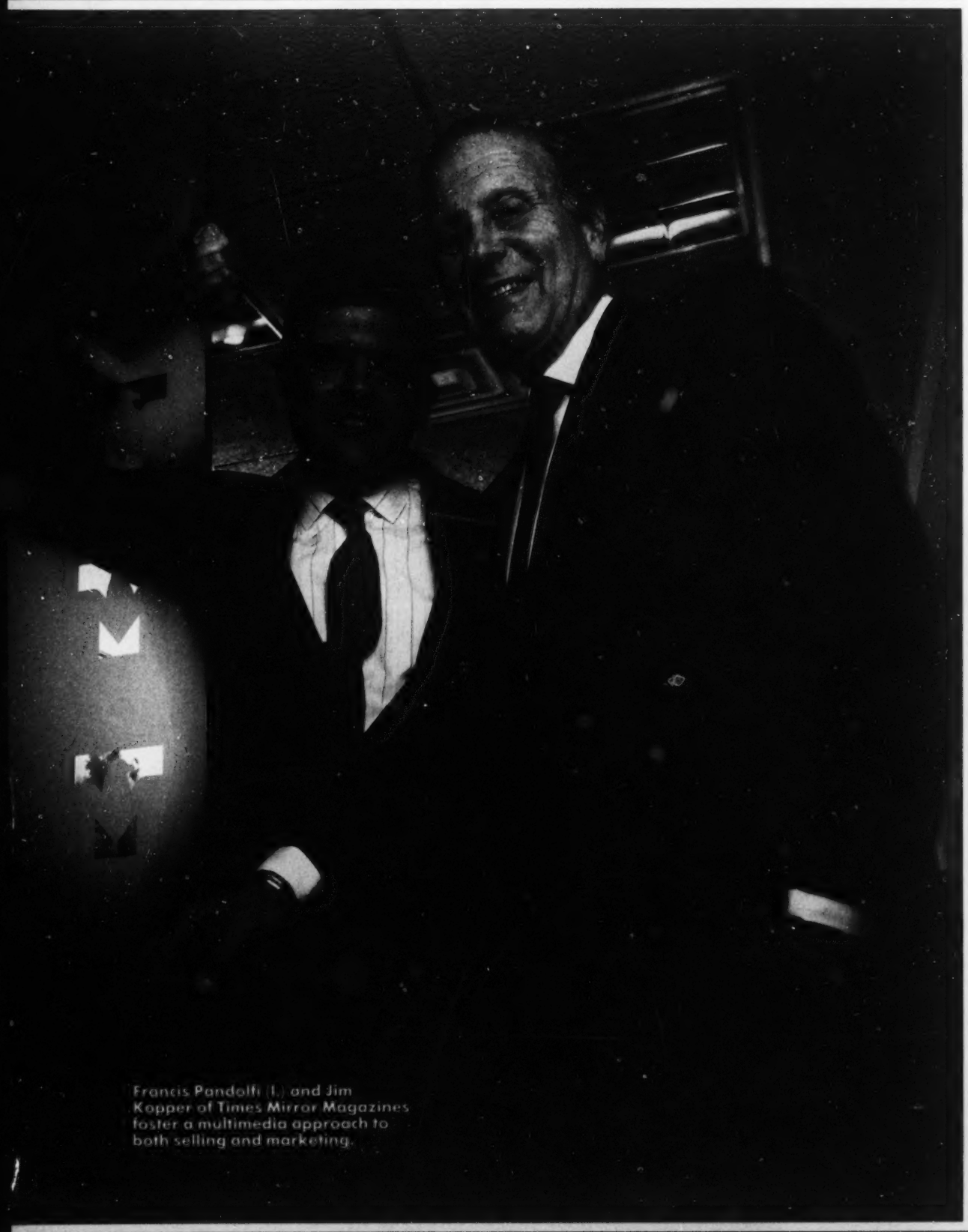
"In looking for good salespeople," Kopper says, "you have to look for people who have a better understanding of the total marketing process, rather than someone who simply sells the basics. You want people who can take that basic information and show how it specifically works for the customer's own goals, people who can show customers how our magazines' editorial content reaches and represents the audience *they* want to reach."

"Our salespeople are all strongly marketing-oriented," Pandolfi stresses, "so they can relate the values of our magazines to our customers. This is why we put a premium on creating special sections for our advertisers, and why last year we did almost 100 of [these sections] in our magazines."

And that kind of value-added marketing is becoming the industry standard, Pandolfi notes. "Anybody who's simply an order taker will not survive," he says. "Everyone is more competitive. Everyone is more interested in increased marketing and sales opportunities. So we're going to be seeking more and more highly talented salespeople for the nineties, and to do that we have to create the kind of company and environment that people want to join. If we can do that, the good salespeople will find us and remain with us."

That attitude may have something

ED KEATING



Francis Pandolfi (l.) and Jim Kopper of Times Mirror Magazines foster a multimedia approach to both selling and marketing.

PROFILE

COMPANY
Times Mirror

MAJOR PRODUCT OR SERVICE
Newspaper publishing; book, magazine, and other publishing; cable television; broadcast television

1989 SALES VOLUME
$3.5 billion overall; magazine division, $200 million

APPROXIMATE NUMBER OF SALESPEOPLE
5,500 corporate-wide; 144 for Times Mirror Magazines

RECOGNITION OF TOP SALESPEOPLE
No individual awards.

SALES PHILOSOPHY
"Making our properties the best they can be for both our readers and advertisers."

BIGGEST CHALLENGE OF THE 1990s
"Offering increasingly demanding advertisers and their agencies multimedia and market buys, and finding the salespeople best qualified to offer them."

to do with why Times Mirror leads the pack when it comes to key areas like opening new accounts, holding accounts, product/technical knowledge, and, perhaps most important, reputation among customers. Given that the competition included such publishers as Gannett, Dow Jones, and the New York Times Co., this is a solid tribute to the company's commitment to multimedia selling across *all* divisions.

Both this concept and Times Mirror's overall commitment to marketing must be working, too, since Kopper notes that last year Times Mirror Magazines alone sold more than 10,000 ad pages totaling more than $200 million in ad sales. So such commitment obviously pays off where it counts.

Speaking for the parent corporation, vice chairman W. Thomas Johnson Jr. says, "We place strong emphasis on customer service and will place even stronger emphasis on it during the nineties. And we will also be increasing our commitment to sales training and development to facilitate that emphasis."

Johnson also feels that another key to Times Mirror's success is his company's strong research and promotion/presentation support staff: "We do a great deal of work for our advertisers, and this staff plays an extremely important role in the presentation and development of that work."

As for the future, Johnson predicts, "This could be the most exciting decade that most of us will ever experience," adding that "there will certainly be a more competitive marketplace, one of great opportunity as well as challenge."

Which brings Johnson to what he personally perceives as the biggest challenge for *all* publishing, let alone Times Mirror—the issue of literacy and readership.

"Literacy is crucial," he says, "and we have to give that as much attention during the nineties as we do to sales. After all, without readers there's no need for advertisers—or for publications, for that matter. And by the same token, without literacy and comprehension, there's no real readership, and therefore no need for any of us to be in the business."—*R.S.*

SHIPPING & DELIVERY SERVICES

AT UPS, A TEAM EFFORT DELIVERS

Teamwork is the corporate philosophy that has spelled success for United Parcel Service. "Our corporation functions as a whole, not as a group of separate individuals," says John Alden, senior vice president of business development. Because of this, UPS doesn't single out its top salespeople for special awards or recognition. "If our company prospers," says Alden, "each individual benefits."

In addition to its team approach, another philosophy that has been an integral part of UPS's success is its employee ownership. A privately held company, UPS stock is owned primarily by its managers and supervisors. Alden explains that the company is "owned by the managers and managed by the owners."

As for its first-place finish in this year's Best Sales Force Survey, Alden isn't all that surprised that UPS garnered top honors in the Shipping & Delivery Services category: "We take great pride in the service we provide, and it's nice to know that customers and competitors are noticing."

They're noticing all right. Of the seven criteria for sales force effectiveness that were surveyed this year, UPS scored its second highest rating in reputation among customers and placed first in product/technical knowledge, another important focus of the firm's sales and service effort. "Our industry is growing rapidly," says Alden, "and we need to keep up with the latest technological advances in order to provide customers with the service they expect."

Among these advances is the company's computerized International Shipments Processing System (ISPS), which speeds customs clearance throughout the UPS international network by providing local customs officials with shipping information well in advance of delivery.

"Customs clearance is one of the biggest problems in international shipping," says Alden, adding that computerized mapping, vehicle routing, and onboard vehicle communications systems are also being developed to assist in both ground and air operations.

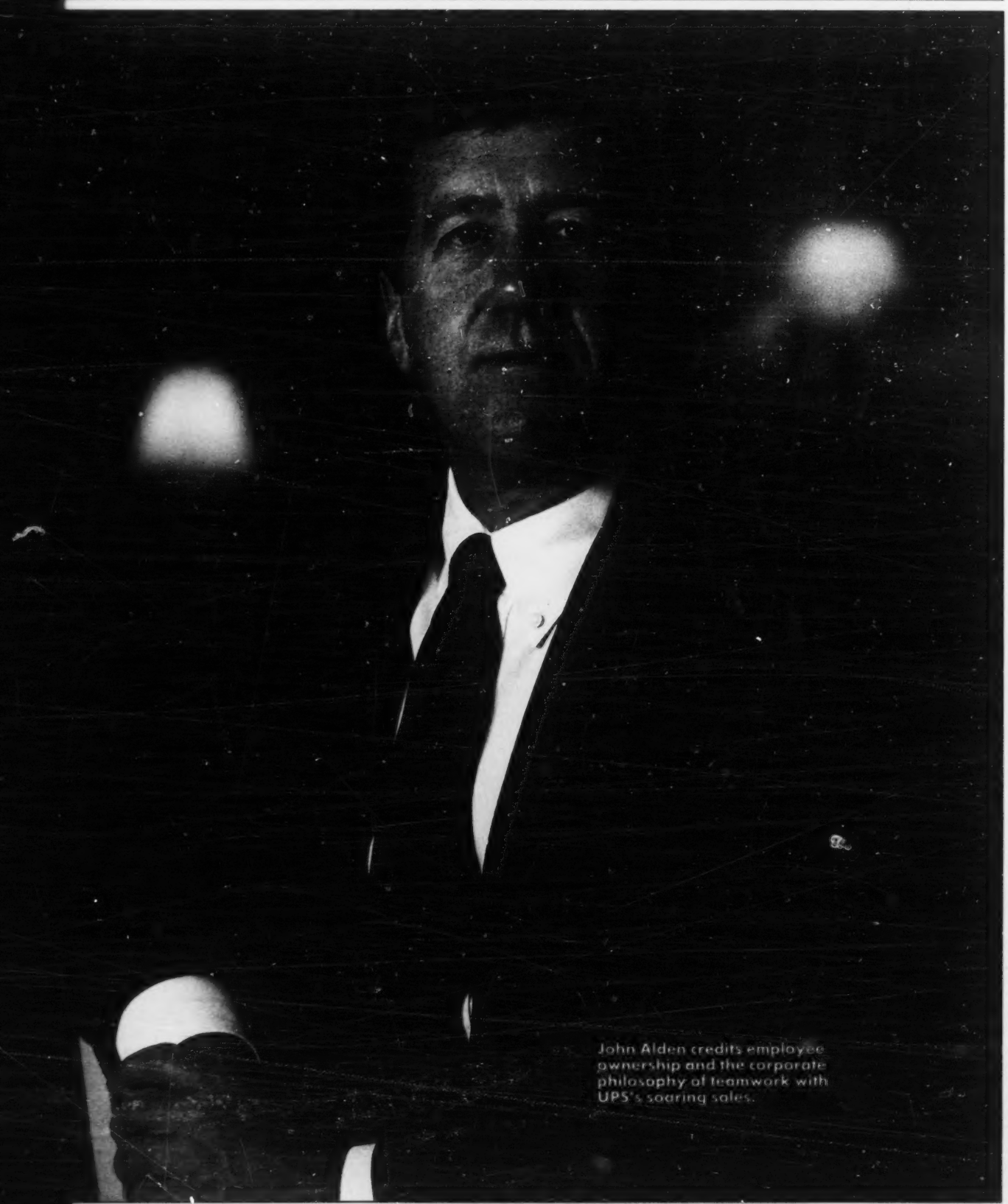
This emphasis on technology has had a significant impact on the sales force, as well. According to Alden, a thorough knowledge of all the technological aspects of these new services is essential to making the sale, which is perhaps why training was the largest sales cost component for UPS in 1989. And it would seem that this training is paying off, since UPS opened approximately 70,000 new accounts last year, an impressive record given the stiff competition in this industry.

Until 15 years ago, the company's only major competitor was the U.S. Postal Service and a few regional delivery companies. Today, it competes on a larger scale, not only on the ground but in the air. Entering the overnight air express business in 1982, UPS built a fleet that today ranks as the nation's tenth largest airline.

Overnight air service also provided a base for the expansion of the company's international network, which now reaches more than 180 countries and territories. In addition, UPS was the first shipping company to serve the Eastern bloc countries, giving it a tremendous edge over the competition as those nations open up to the West.

These global commitments have grown hand in hand with the UPS work force, which more than doubled in size during the 1980s and now stands at 230,000 employees, including more than 1,000 salespeople. "Dedicated and loyal people have always been our most important resource," says Alden, though he does allow that for many

BRAD MAAKEL/GAMMA-LIAISON



John Alden credits employee ownership and the corporate philosophy of teamwork with UPS's soaring sales.

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SALES & MARKETING MANAGEMENT

PROFILE

COMPANY
United Parcel Service of America, Inc.

MAJOR PRODUCT OR SERVICE
Package delivery

1989 SALES VOLUME
$12.4 billion

APPROXIMATE NUMBER OF SALESPEOPLE
1,000+

RECOGNITION OF TOP SALESPEOPLE
"Success is a team effort; we don't reward on an individual basis."

SALES PHILOSOPHY
"Our reputation among customers is most important."

BIGGEST CHALLENGE OF THE 1990s
"Providing additional technological training that will help us compete on a global level."

years it wasn't easy to attract them. "Shipping, especially the transportation of small packages, was not viewed as a very glamorous business to be in," he says. "It was not enticing enough for a young person entering the work force."

All that has changed, however, as a result of the company's growth and reputation. Now, says Alden, "We have a great number of young, educated people working for us and the growth potential is very promising." UPS has a policy of promoting from within; in fact, most of the company's managers once delivered packages or performed other jobs as hourly employees before being promoted to management. Alden himself started out as a general office clerk back in 1965.

When asked what sets UPS apart from the competition, Alden offers this simple philosophy: "Commitment to quality at the lowest rates—the lowest in the industry." This may account for UPS's record-breaking statistics for 1989: 2.8 billion packages and documents delivered, almost twice the number processed in 1980, and revenues of more than $12 billion, a 300% increase in less than 10 years. —*K.R.* □

STATE OF THE STATES: FLORIDA

These days, the biggest story in the Sunshine State is the climate. The business climate, that is.

BY PAT SEELIG

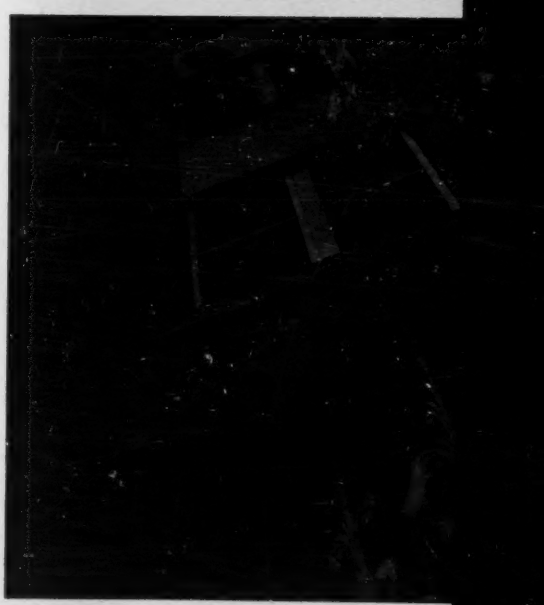
Growth is the word that comes to mind when talking about Florida. Since 1980, only three other states—Alaska, Arizona, and Nevada—have posted higher population growth rates, although Florida's bottom-line gain of nearly 2.5 million new residents is more than twice as high as the other three states put together. The Sunshine State's population is expected to reach 14.2 million by 1993, solidifying its status as the nation's fourth-largest state, a position it has enjoyed since 1987.

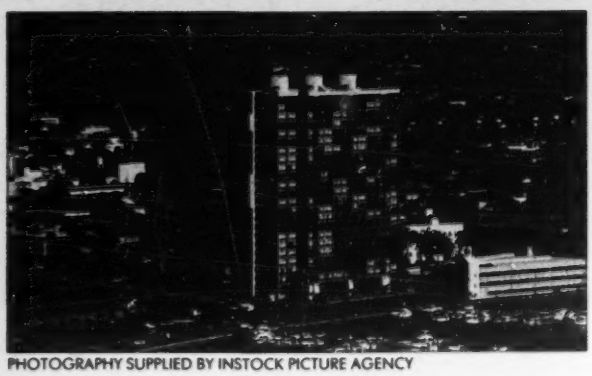
The most oft-cited reason for this impressive record of growth is Florida's warm climate, year-round access to beaches, more than 1,000 golf courses, a new and improving highway system, modern airports, and a lifestyle that typically takes advantage of all these things.

As a result, the state is filling up with thousands of retirees escaping the hustle and bustle (not to mention the nasty winters) of big northeastern and midwestern cities, as well as a healthy share of corporate relocations, which bring with them a younger crowd seeking pretty much the same things as the retirees.

Then there's the growth from the south. Southeast Florida in particular has become a mecca for economic and political refugees from Cuba, South and Central America, and various Caribbean nations. And while many of these new Floridians don't have the necessary skills to place them in high paying jobs, they have helped fill the growing employment needs of a host of service-related businesses.

This potpourri of cultures and ages creates a unique and complex marketing environment that's roughly divided into three distinct geographic regions. First, there's northern Florida and the Panhandle, which is really more akin to rural Georgia and Alabama than to the rest of the state. In the middle is booming central Florida, a primary destination for white-collar workers and tourists from all parts of the U.S., who bring with them vestiges of their hometown cultures. And then there's south Florida (including both east and west coasts), which runs the gamut of local and international residents—good ole southern boys, transplanted Latin Americans, retirees, and wealthy snowbirds seeking opportunity in the land of the pink flamingo. Obviously, understanding this unusual mix requires a closer look at the various social and economic factors that influence each of Florida's six major metro markets, which for our purposes have been defined as those with populations of 800,000 or more. ▶





PHOTOGRAPHY SUPPLIED BY INSTOCK PICTURE AGENCY

Stretching toward the sun: high-rise developments in (clockwise from left) Palm Beach, Miami, West Palm Beach, and Orlando's Walt Disney World.

FORT LAUDERDALE-HOLLYWOOD-POMPANO BEACH

Mention the city of Fort Lauderdale, and the first image that comes to mind (for those over 40, at least) is Paula Prentiss, Connie Francis, Frank Gorshin, Yvette Mimieux, and George Hamilton percolating each other's hormones in the 1960s movie *Where the Boys Are*. And with good reason, since Fort Lauderdale and the rest of Broward County have been the springtime destination of choice for fun-seeking collegians for more than 30 years.

Of course, things are a bit different along the famed "strip" these days. Although the kids still come each spring, according to Jim Garver, president of the Broward Economic Development Board, their numbers are about 50,000, compared with a peak of 350,000 in the sixties and seventies. In their place, however, have come an equal number of retired and semiretired snowbirds, seeking refuge from the bitter winters up north. "Between twenty-five and thirty-five percent of our population is retirement-based," says Garver, "but we're also seeing a number of people in the fifty to fifty-five age range move down to Broward County."

These "younger" people are essentially semiretired types, taking flextime jobs to supplement their incomes while enjoying the benefits of the retirement lifestyle. Garver says their plans often go astray, however, once they hear the siren song of the sunset, the first tee, or the fishing pier.

STATE STATISTICS

POPULATION
Total: 12,506,500
Male: 5,989,067
Female: 6,517,433
Black: 1,840,100
Hispanic: 1,217,000
Median Age: 37.6
Households: 5,059,300

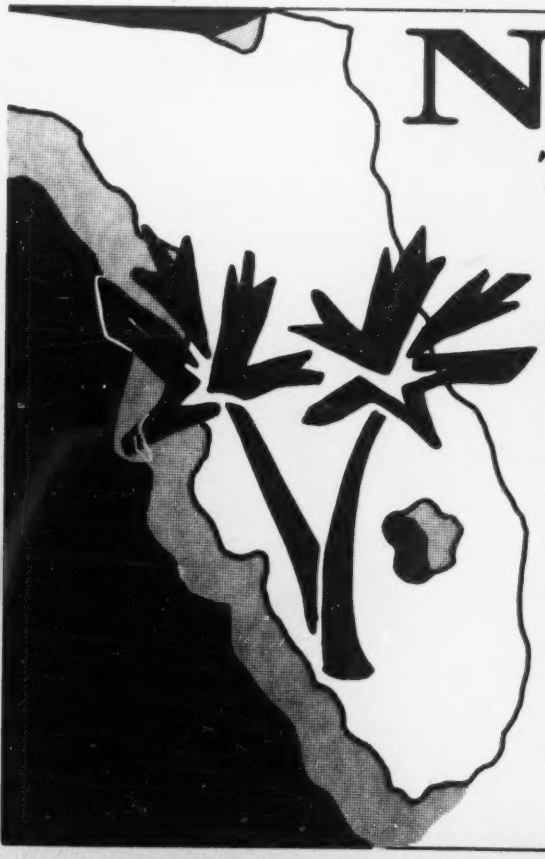
EFFECTIVE BUYING INCOME
Total: $156,648,998,000
Median Household: $22,820

RETAIL SALES
Total: $94,994,314,000
Per Household: $18,776
Apparel: $3,987,898,000
Automotive: $24,466,369,000
Drugstore: $3,686,312,000
Eating & Drinking: $9,058,065,000
Food: $19,045,383,000
General Merchandise: $10,139,866,000

BUYING POWER INDEX
5.3053

In spite of the seemingly "either/or" orientation of Broward County's population, it would be overly simplistic to characterize this metro area as just a haven for college students and retirees. Fully 40% of the population falls in the 19-49 age group, and most are engaged in service sector jobs in health care, research and development, and other "clean" industries. The result is a reasonably high median household Effective Buying Income (EBI) of $26,836, although the median age is a relatively old 41.0, again reflecting the size and strength of the retirement sector.

Like other Florida markets, FL-H-PB relies heavily on the tourism industry, and because of this, the area is trying to attract more families, as opposed to out-of-towners and the affluent visitors from nearby Palm Beach County. "We're trying to become more broad-based economically, and we have a lot of things for families to do, like golf and boating," says Garver. "We're also nearing completion of our convention center and a performing arts center, and as Broward County matures, we're finding that the performing arts are becoming a way of life here." ▸



NAPLES

THE FASTEST GROWING MSA IN THE U.S.

TOTAL RETAIL SALES PER HOUSEHOLD		FOOD SALES PER HOUSEHOLD	
NAPLES	**$23,398**	**NAPLES**	**$5,318**
Miami	$22,675	Gainesville	$4,314
Orlando	$21,448	Orlando	$4,157
Ft. Lauderdale	$21,248	Ocala	$4,093
Sarasota	$20,377	Bradenton	$4,070
West Palm Beach	$20,349	Fort Pierce	$4,023
Fort Walton Beach	$20,072	West Palm Beach	$4,016
Bradenton	$18,959	Lakeland	$3,987
Ocala	$18,794	Sarasota	$3,973
Panama City	$18,515	Fort Myers	$3,887

SOURCE: 1989 Sales & Marketing Management Survey of Buying Power

Naples Daily News

A Scripps Howard Newspaper
1075 Central Avenue • Naples, FL 33940
National Advertising (813) 263-4745

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One fact that can't be overlooked in any marketing plan is Fort Lauderdale's proximity to Dade County and its large Hispanic population. Although most Hispanics in Broward County are of Cuban extraction, Garver says that the area has also developed pockets of black, Hispanic, and Caribbean culture that are quite diverse. "We have Cuban communities, Haitian communities, Jamaican communities, and many others," he says. "The Cubans are often entrepreneurs with their own businesses, while the Haitians and Jamaicans fill a lot of the entry-level and service positions."

This diversity complicates marketing efforts aimed at Hispanics and blacks, particularly since many blacks in Broward County speak French as their native language, while Jamaican blacks retain their distinctive patois and differ culturally from native African-Americans and other groups.

Chamber of Commerce:
305-462-6000/305-920-3330/
305-941-2940
Convention & Visitors Bureau:
800-356-1662/305-765-4466

Population: 1,214,300
Households: 526,500
Black: 154,700
Hispanic: 54,600
Median Age: 41.0
Total EBI: $18,729,983,000
Median Hshld. EBI: $26,836
Retail Sales: $11,186,879,000
Buying Power Index: .6085

JACKSONVILLE

If Orlando (home of Walt Disney World) is tourism incarnate, then Jacksonville is its antithesis. Not only is Jacksonville the major Florida market least dependent on tourism, it is also very much a blue-collar market populated by laborers and clerical workers, says Dr. Joseph M. Perry, professor of economics at the Univ. of North Florida.

"A lot of people think that blue-collar types are only factory workers, but if you go into downtown Jacksonville at five p.m., you'll see a lot of secretaries, accountants, and others leaving work," he says.

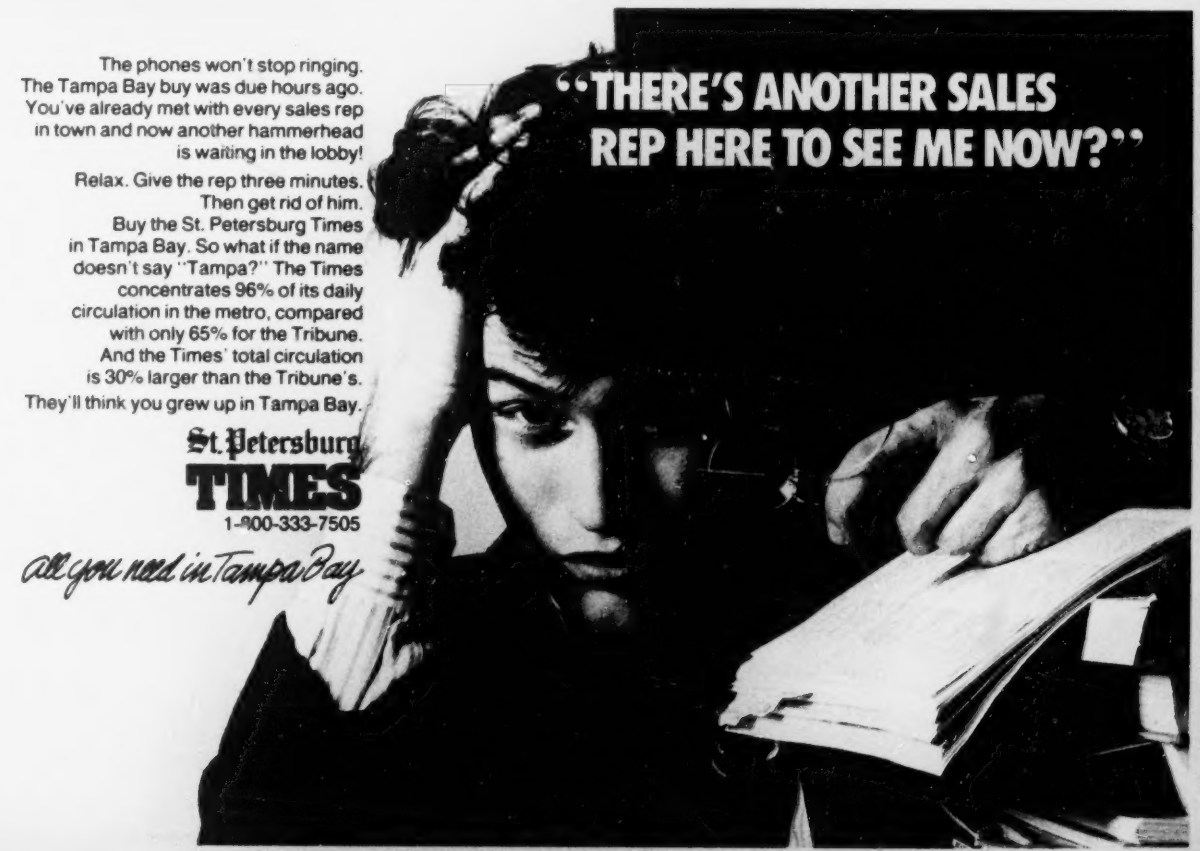
The main reason for Jacksonville's blue collar, non-tourist image is the St. Johns River, a major port for the entire state. This unique economic slant necessarily requires large numbers of blue-collar workers to man the docks, handle distribution, and generally make a living from industries related to the transportation and shipping trades. Still, there are a lot of white-collar workers in Jacksonville as well, with Barnett Bank—the state's largest—headquartered here, and the PGA Tour—with annual revenues of $127 million—headquartered in nearby Ponte Vedra Beach.

Chamber of Commerce:
904-353-0300
Convention & Visitors Bureau:
904-353-9736

Population: 918,000
Households: 348,800
Black: 204,300
Hispanic: 18,900
Median Age: 31.9
Total EBI: $11,084,802,000
Median Hshld. EBI: $24,320
Retail Sales: $5,981,874,000
Buying Power Index: .3644

This balance of employment creates a somewhat stable environment in the Jacksonville metro, and the median household EBI ($24,320) is well above the state figure of $22,820, partly because it's not being pulled down by fixed-income retirees or recent economic or political refugees from Latin America.

In spite of this relatively healthy in-



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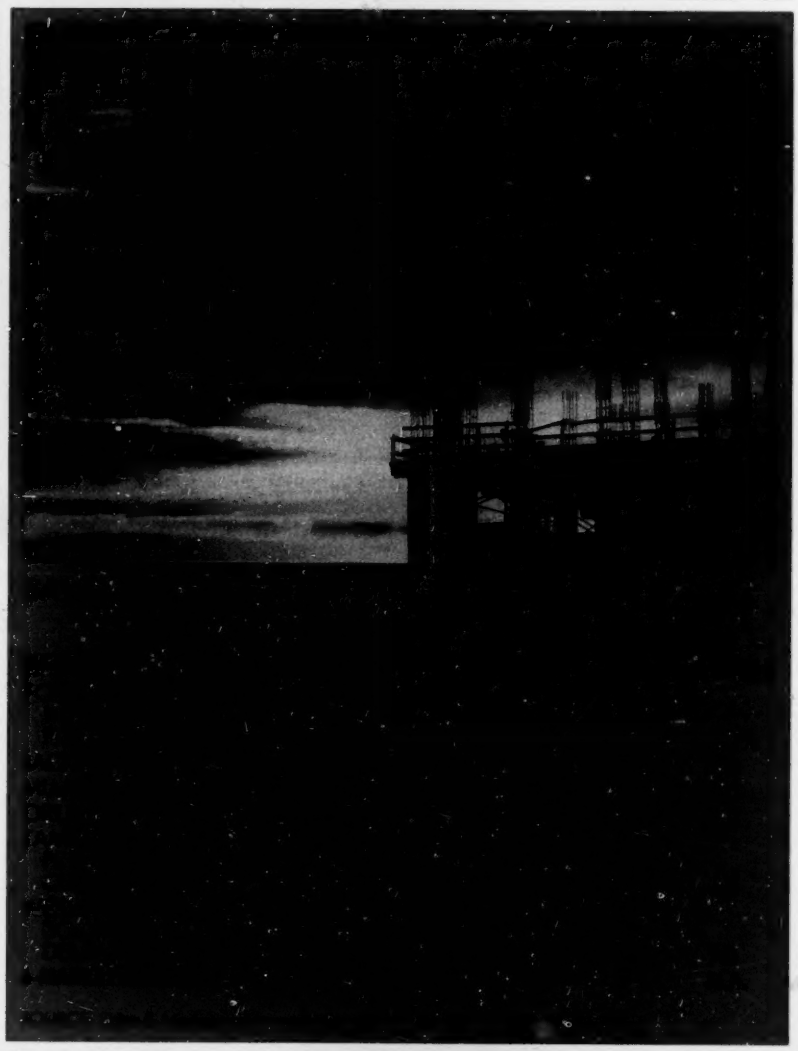
come picture, however, Dr. Perry points out that Jacksonville is not a particularly big retail market. "We don't have a complex of upper-end specialty stores like Saks, primarily because of our small base of affluent consumers," he says. "On the other hand, Duvall County [where the city of Jacksonville is located] is very stable, and our unemployment is usually lower than the rest of Florida."

MIAMI-HIALEAH

At first glance, the popular notion of Miami as the nation's most international city certainly seems accurate, although according to Charles Jainarain, director of research for the Beacon Council, an economic development organization in Dade County, the image of this metro area as one dominated by Cuban-Americans and hoards of tourists really doesn't tell the whole story.

"The traditional view is that the Hispanics in Miami are all Cuban," says Jainarain, "but in the last year the highest percentage of new school enrollees has been Nicaraguan. We're seeing more and more people coming to Miami from all over Central and South America."

Jainarain, himself an immigrant from South America, points out that Miami and Hialeah are the main focal points for many affluent Latin Americans, both in terms of immigration and as a place to obtain luxury goods and essentials that are either unavailable or too expensive in their native countries. "Miami is the place where they buy in bulk," he says. "When you look at the statistics, Miami typically ranks between thirtieth and fortieth in most cat-

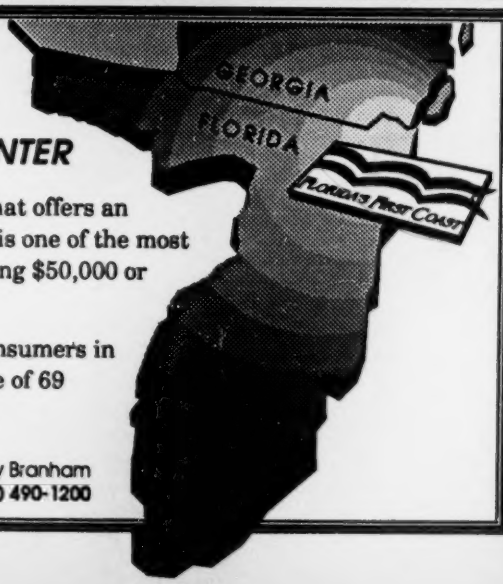


Jacksonville

FLORIDA'S NEW UPSCALE GROWTH CENTER

Jacksonville is the heart of Florida's First Coast, an area that offers an excellent combination of solid growth and buying power. It is one of the most affluent in the state with 17 percent of the households having $50,000 or more in buying income, up from three percent in 1980.

The Florida Times-Union reaches more of these affluent consumers in Florida's First Coast than any other medium, with coverage of 69 percent on weekdays and 82 percent on Sunday.



The Florida Times-Union

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ON TOP IN FLORIDA

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Chamber of Commerce:
305-350-7770/305-887-1515
Convention & Visitors Bureau:
305-573-4300

Population: 1,850,400
Households: 710,300
Black: 381,300
Hispanic: 803,900
Median Age: 37.4
Total EBI: $22,841,426,000
Median Hshld. EBI: $23,194
Retail Sales: $16,170,088,000
Buying Power Index: .8181

egories, but we're ranked fifteenth in retail sales, and I think that really says something about people's buying habits here."

Nonetheless, the popular conception of Miami is still germane to the overall market, although the high-powered and well-armed drug lords of *Miami Vice* fame are not a demographic group the chamber of commerce particularly likes to talk about. Of course, the other popular image of Miami as a "southern version of New York City," filled with snowbirds, vacationers, and retirees, is just as valid.

Jainarain points out that approximately one in five Dade County residents is originally from New York, many having been attracted to the area by the low cost of housing—about $86,000 for an average home. But the real story these days is that Miami is beginning to become something of a corporate headquarters mecca for Latin American-based business and, conversely, for U.S. businesses focusing on Latin America.

The main attraction, naturally, is easy access to the Southern Hemisphere, which in turn is creating more middle-level jobs for Miami's working class. Jainarain cites the fact that 10% of all Dade County jobs are manufacturing-based, while 50% are in trade and services. "Miami is a base for services that target all of Latin America," he says.

The flip side is that Miami is also somewhat economically divided. Overall, the Cuban, retiree, and native American population tends to be more affluent, but the influx of refugees fleeing political and economic oppression typically take jobs at lower-than-average wages. This effectively lowers Miami's statistical buying power, contributing to the second lowest median household EBI of any major Florida metro at $23,194. Of course, this doesn't take into account the buying power of visitors from Latin America, who come to Miami armed with plenty of disposable *dinero*, as well as the thousands of affluent vacationers who don't mind forking over their considerable tourist cash.

A potential boost to the local economy could come when the city hosts the 1994 World Cup Soccer Match, with the prospect of well-off soccer fans coming from all over the world helping to further boost the city's reputation as a burgeoning sports center.

"We already see it happening," says Jainarain. "We have a lot of sporting events here like the Super Bowl, the Grand Prix, the Doral Open Tournament [golf], and the Univ. of Miami teams. I'd have to say that the sports aspect here is one that's often overlooked."

ORLANDO

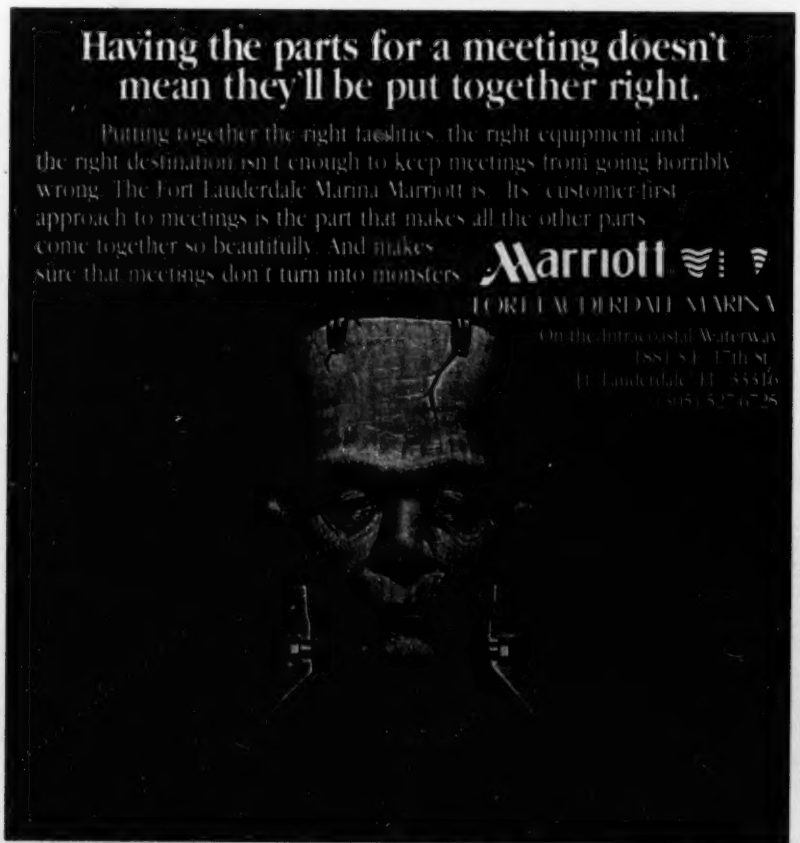
Those who feel that Orlando has sold its soul to the "Mouse" are, in a sense, correct. With more than 175,000 people employed in the tourism industry—35,000 with Disney alone—tourism is by far the most important part of the Orlando economy. "The Mouse is unquestionably a major factor here," says Ron Thibodeaux, senior vice president of the Orlando Economic Development Council. "We're well aware that twenty million people don't come to Orlando just to see us at the EDC. On the other hand, manufacturing is our second-largest employer, and we're trying to make our economy less dependent on tourism."

Already, Orlando is home to a number of hi-tech manufacturing companies, and the area has also become a major distribution point for the entire Florida market, thanks to its centralized location and excellent airport.

But even here the Mouse is largely responsible for Orlando's success, since the demands of the tourist industry have helped increase the frequency and variety of flights to and from the area and, along with them, Orlando's ability to attract new business. "A good airport is a critical factor in attracting outside

Chamber of Commerce:
407-425-1234
Convention & Visitors Bureau:
407-345-8882

Population: 989,700
Households: 379,100
Black: 130,300
Hispanic: 40,700
Median Age: 33.3
Total EBI: $12,437,865,000
Median Hshld. EBI: $24,947
Retail Sales: $8,130,784,000
Buying Power Index: .4316


Having the parts for a meeting doesn't mean they'll be put together right.
Putting together the right facilities, the right equipment and the right destination isn't enough to keep meetings from going horribly wrong. The Fort Lauderdale Marina Marriott is. Its customer-first approach to meetings is the part that makes all the other parts come together so beautifully. And makes sure that meetings don't turn into monsters.
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FORT LAUDERDALE MARINA

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business," says Thibodeaux, "and we feel ours is one of the best in the country. Another major factor is the Univ. of Central Florida, which has an excellent technical school. It contributes a lot of engineers to companies like Martin Marietta, which employs fifteen thousand people here."

The combination of the tourist industry and manufacturing, distribution, and service-related companies makes the Orlando area one of the most dynamic and diverse markets in Florida. To be sure, it has its share of retirees, but Thibodeaux calls Orlando a "white-collar community" filled with professionals, many of them concerned with key elements of the local infrastructure—schools, highways, and the long-term economic stability of the region. Also, because there are so many younger people just getting started in their careers, the median household EBI is a relatively healthy $24,947, ranking Orlando in the middle of the six major Florida markets profiled here. On the spending side, the influx of 20 million tourists a year makes Orlando a strong retail market, with annual sales of $8.13 billion against a population of only 989,700.

The problem with all this retail activity is that many of these sales are devoted to tourist gift items and sundry bargains obtained at outlet stores along Independence Blvd., the city's main marketing thoroughfare. On the other hand, Orlando is a very strong restaurant market, ranking first in the state and 21st nationally, with eating and drinking place (bar and restaurant) sales of $2,308.44 per household.

TAMPA-ST. PETERSBURG-CLEARWATER

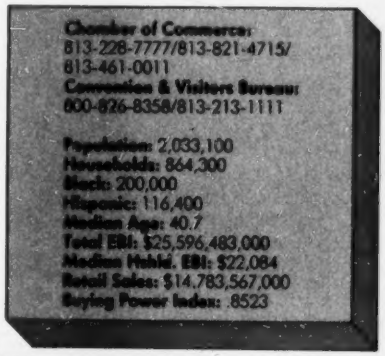
The secret to marketing in the Tampa Bay area is simply a matter of following the age-old formula: "Will it play in Peoria?"

This thriving metro area, which includes Tampa, St. Petersburg, and Clearwater, is as close to the all-American city of Peoria as you'll find in Florida, mainly because so many of its more than 2 million residents come from places like Illinois, Indiana, Michigan, Ohio, and Pennsylvania.

According to Larry Grossman, research director for the Committee of 100, a local economic development organization, the Tampa Bay area is the most diverse market in Florida, in spite of the fact that the region's average age of 40.7 makes it the oldest of the nation's 20 largest metro areas.

"There are a lot of retired people in the counties around Hillsboro [Tampa's home county]," says Grossman, "but Tampa itself is a thriving market with a number of large companies in communications, data processing, food processing, and publishing."

This means that Tampa is less dependent on tourism as a source of revenue, due in large part to the presence of major employers like IBM, USAA Insurance, Time/Life Customer Service, and other financial and service-related firms. In addition to this broad industrial base, Grossman (naturally) cites the mild Florida climate as well as the large number of eager and educated employ-



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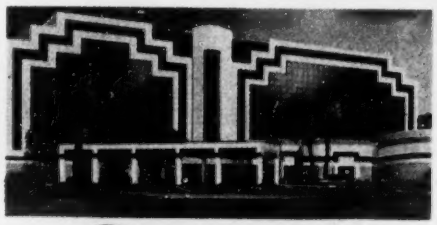
Very soon, visitors to Orlando won't have to choose between the convenience of an airport location and the quality of a luxury hotel. The new Orlando Penta Hotel will offer both.

Just a mile from Orlando International Airport, this luxurious hotel is the newest of a chain of 4-star European hotels recognized for excellence.

The Orlando Penta Hotel will have 300 oversized rooms, a concierge level, 20 junior suites and a 2-bedroom Presidential Suite with a separate conference room.



The hotel offers 10,000 square feet of flexible meeting space featuring The Vienna Ballroom with banquet facilities for 350; five boardrooms; a spectacular amphitheater perfect for state-of-the-art audiovisual presentations; five restaurants and lounges; a business center; a fully equipped exercise and fitness area; a large outdoor pool; and closed-circuit television systems that allow guests to view meetings from the comfort of their rooms.

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ees—either young people, retirees working part-time, or any of the 136 people who, on average, relocate to the Tampa Bay area each and every day of the year.

The distinct middle-American flavor of this market means that determining the values of the average T-SP-C resident is somewhat easier than in other Florida metros, with the only drawback being the area's lower-than-average median household EBI ($22,084), the lowest among the six markets profiled here.

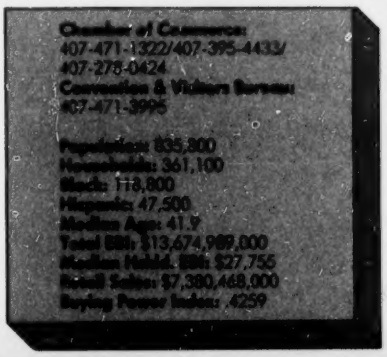
On the other hand, Grossman says that this figure, although correct, can be somewhat misleading: "Hillsboro County itself has a household [EBI] figure of $23,588, and the main reason the overall income is so low is that there are a lot of people living on fixed incomes in the surrounding counties. In one sense, that has a stabilizing effect, since they tend to receive the same amount of money every month at the same time of the month."

WEST PALM BEACH-BOCA RATON-DEL RAY BEACH

Dennis Grady, executive director of the Chamber of Commerce of the Palm Beaches, is quick to point out that Palm Beach County is one of the 10 fastest growing counties in the United States. And while this northernmost portion of the Florida Gold Coast is booming, Grady says that its growth pretty much reflects what can be found in other parts of the state.

"It's really location, location, location," he says. "We're in a part of the state that has an excellent climate, and we also have one of the three largest airports in southeast Florida."

As in other parts of the Sunshine State, the key element in WPB-BR-DB's economy is tourism—particularly golf. With no fewer than 100 eighteen-hole golf courses in Palm Beach County alone, affluent duffers have tended to flock to this area to pursue their game rather than opt for the more broad-based tourist attractions of nearby Broward and Dade counties.



In fact, Grady says that golf has actually played a role in attracting new business to the region: "[Golf] has a positive influence on new business relocations, since a lot of senior executives either vacation here or have a winter home in the area. Consequently, because they enjoy it so much, they decide to relocate their businesses here. They recognize that we're a global economy, and you don't have to be in New York or Chicago anymore to do business. You can be in Palm Beach and still have access to a good airport and telecommunications."

Sound a bit like *Lifestyles of the Rich and Famous*? Well, if any of the six major Florida metro markets falls into that slot, Palm Beach County is it. With super-luxury properties like the Boca Raton Hotel & Club and The Breakers, the typical tourist who frequents this area is the East Coast equivalent of those westerners who populate Palm Springs, Cal.

This kind of conspicuous affluence is reflected in the metro area's median

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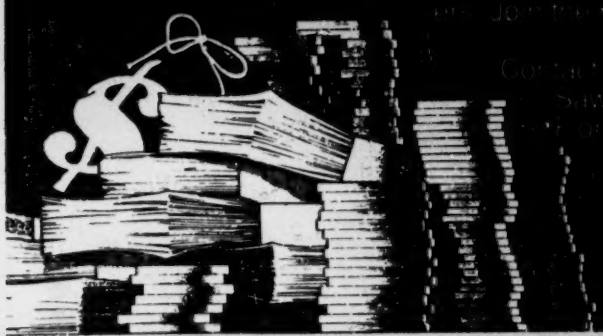
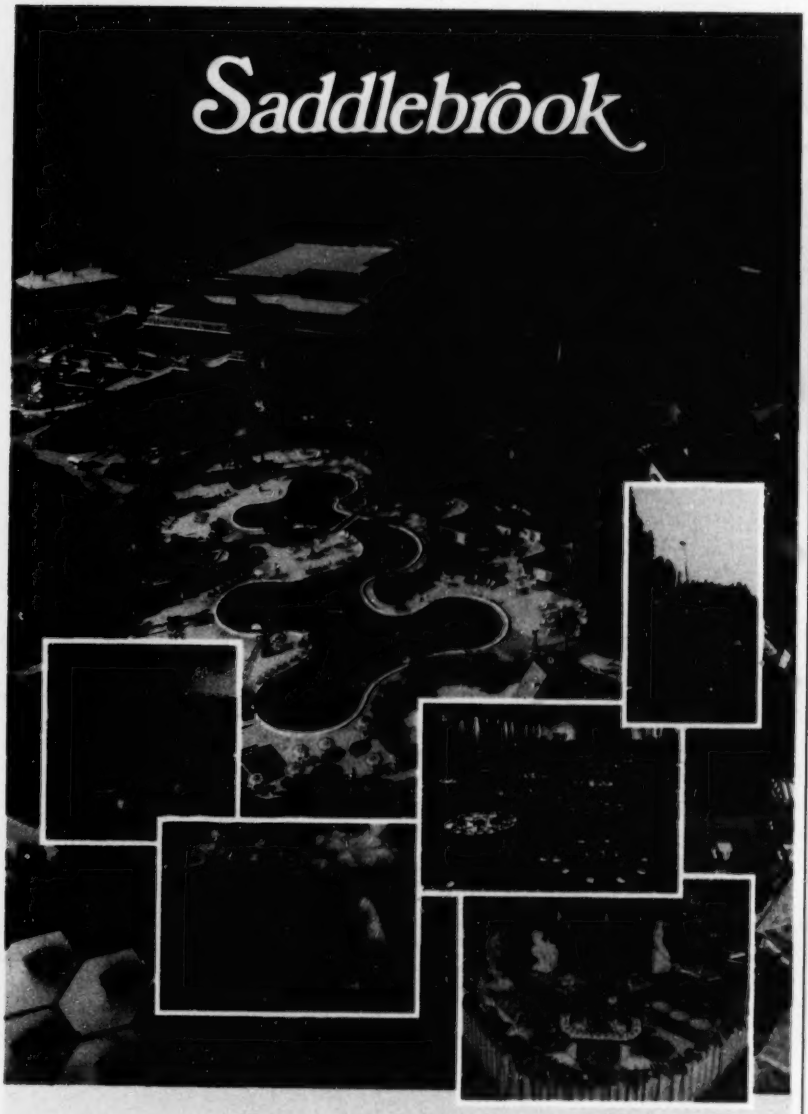


The Tampa Tribune
Tampa Bay's Newspaper

SUPER BOWL XXV January 1991



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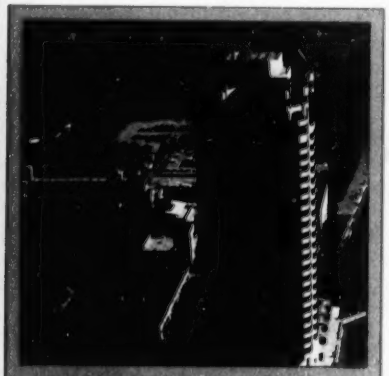


AWARD-WINNING HOTELS AND RESTAURANTS

Since 1985, *Sales & Marketing Management* has handed out a total of 21 Business Executives' Dining Awards to the 5 Florida restaurants listed below. These awards are based on the votes of our readers, who selected these dining spots as their favorite places for entertaining clients and customers in the Sunshine State.

In addition, S&MM's sister publication, *Successful Meetings*, offers its annual Pinnacle Award to outstanding hotels and meeting facilities, with a total of 24 Florida hotels receiving this prestigious designation since 1985.

RESTAURANTS

Bern's Steak House: Tampa
Boca Raton Hotel & Club: Boca Raton
Columbia: Tampa
Joe's Stone Crab: Miami Beach
The Rusty Pelican: Key Biscayne

HOTELS

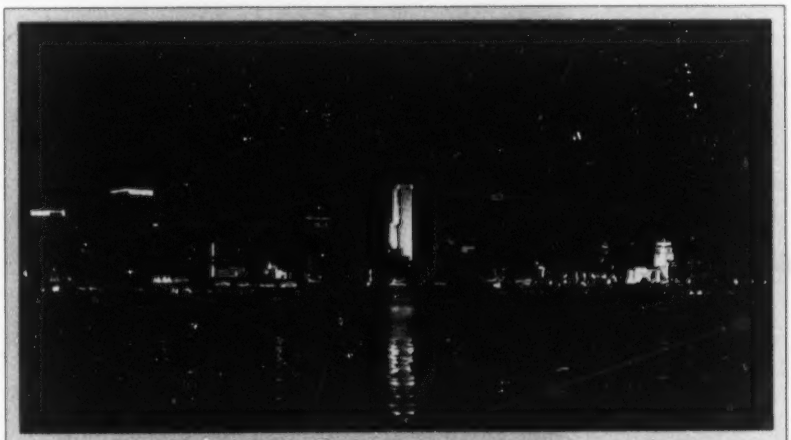
Amelia Island Plantation: Amelia Island
Boca Raton Hotel & Club: Boca Raton
The Breakers: Palm Beach
Buena Vista Palace: Lake Buena Vista
Diplomat Resort: Hollywood
Don CeSar Registry Resort: St. Petersburg
Doral Hotel & Country Club: Miami
Fontainebleau Hilton: Miami Beach
Hyatt Regency Grand Cypress: Orlando
Innisbrook Resort: Tarpon Springs
Longboat Key Club: Sarasota
Marriott Grand Hotel: Point Clear
Marriott Harbor Beach Resort: Fort Lauderdale
Marriott Marco Island Resort: Marco Island
Marriott Orlando World Center: Orlando
Peabody Orlando: Orlando
Registry Resort: Naples
Ritz-Carlton: Naples
Saddlebrook Golf & Tennis Resort: Wesley Chapel
Sheraton Bonaventure Hotel & Spa: Fort Lauderdale
South Seas Plantation: Captiva Island
Stouffer Orlando Resort: Orlando
Walt Disney World Resort: Lake Buena Vista
Wyndham at Sea World: Orlando

household EBI, which at $27,755 is the highest of any Florida market. And with the average house going for $120,000 (also the highest in the state), this makes Palm Beach County exceedingly attractive to wealthy northerners, since these figures are still relatively inexpensive when compared to those in New York and California.

On the other hand, Palm Beach County does have its share of "corporate" residents who are neither close to retirement nor living the lifestyle of the rich and famous. IBM, Pratt & Whitney, and Motorola all have major facilities in the area, and their presence is beginning to offset the rather high median age of 41.9 years.

Grady is optimistic that these newer residents will contribute to an environment that will help to attract more such business to the area. "Our growth has been a lot more controlled than what we've seen in Dade and Broward counties," he says. "We haven't grown as fast, and now we feel we're in a position to take advantage of that." □

Pat Seelig is a Dallas-based freelance writer who regularly covers such topics as sales management, marketing, and golf.



FLORIDA GROWTH STATISTICS

	TOTAL POPULATION	TOTAL HOUSEHOLDS	TOTAL EBI ($000)	AVERAGE HSHLD. EBI	TOTAL RETAIL SALES ($000)
1970:	6,964,400	2,351,900	$21,528,151	$ 9,154	$ 13,314,543
1980:	10,026,000	3,877,600	$ 74,347,623	$19,174	$ 47,387,758
1988:	12,506,500	5,059,300	$156,648,998	$30,963	$ 94,994,314
1993:	14,020,200	5,799,500	$252,734,523	$43,579	$152,893,194

SOURCE: Sales & Marketing Management; *1989 Survey of Buying Power, Parts I & II.*

THE TARGET YOU MUST MARKET

Not only is Palm Beach County, Florida, the nation's fastest-growing metro area, its 900,000 residents have the nation's tenth-highest per capita annual incomes.

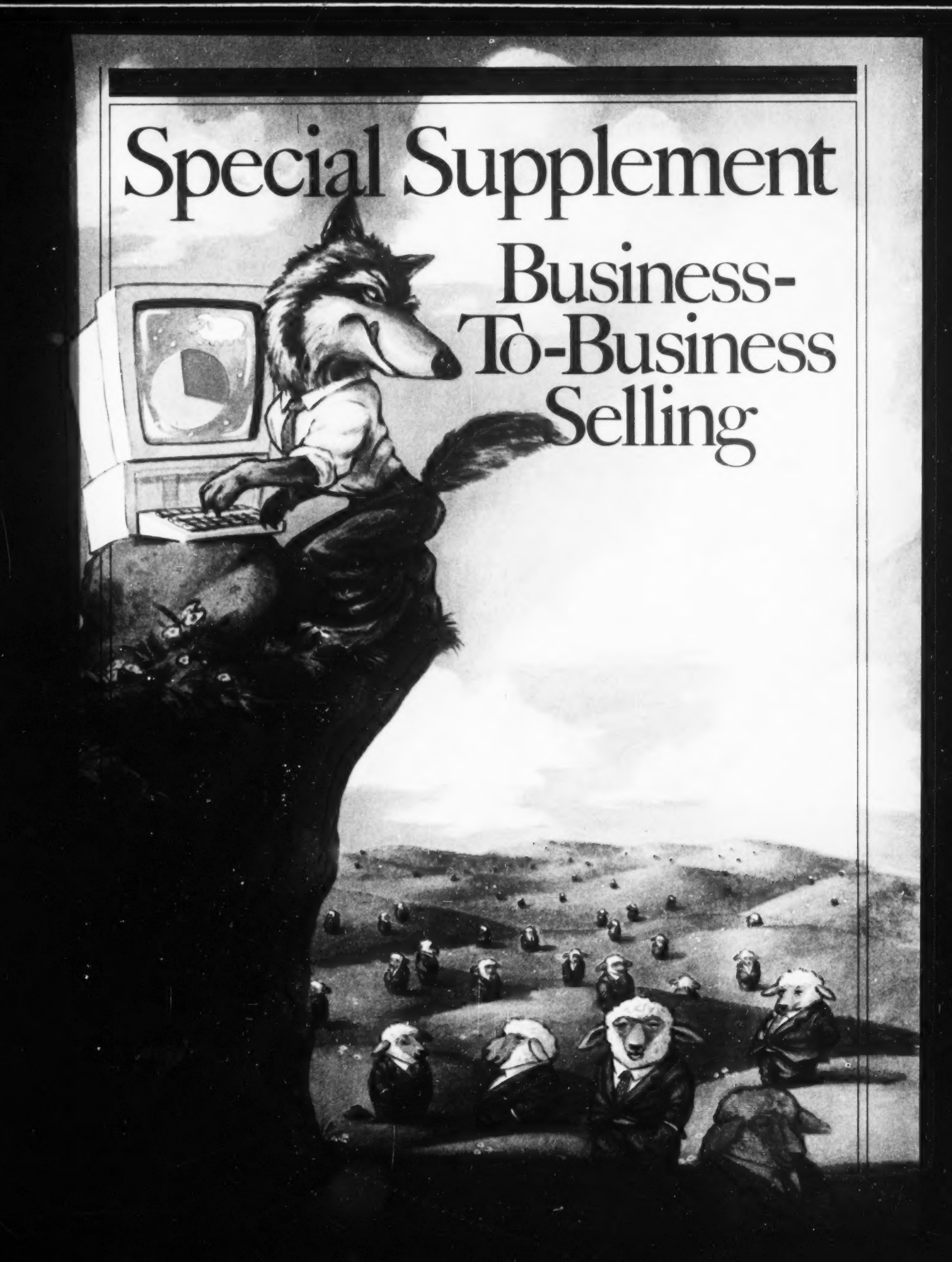
For information in detail on this affluent market, call The Palm Beach Post's research department at (800) 926-7678.

Sources: U.S. Department of Commerce.

Circle No. 134 on Reader Service Card

Special Supplement

Business-To-Business Selling



Using Data to Increase Marketing Effectiveness

With consumer demographics grabbing all the headlines, where's a business-to-business marketer to go for data these days?

BY GERALD REISBERG

In spite of the many complexities involved with business-to-business selling, success rests primarily in the proper management of three basic elements: products, markets, and competition.

In a nutshell, once a company has developed a product to serve a qualified marketing need, it must then stave off the inevitable competitive forays that can hinder penetration, growth, and an expanding market share. And because a healthy and growing market share is largely dependent on market penetration, the creation of a broad and loyal base of customers becomes the essential first step on the road to marketing success.

According to recent figures, a face-to-face industrial sales call can cost as much as $300 these days, and with telemarketing and direct mail costs on the rise due to the expense of personnel, systems, postage, printing, research, mailing lists, and other factors, this makes it increasingly difficult—not to mention expensive—to establish and maintain a solid customer base. Because of this, it is fundamental that you be able to select market segments and sales prospects that will not only benefit substantially from your company's products and services but will also hold sufficient revenue potential to justify the time and effort you invest in them.

For business-to-business marketers, the challenge to define market segments and get a handle on market potential hinges largely on the availability of reliable business data. Efforts to compile lists of active business locations have revealed that there are approximately 10 million such "establishments" in the U.S. at any one point in time, although it is commonly held that there are an additional 2 million currently operating businesses that are not identified on the lists due to the ever-changing dynamics of the marketplace.

In spite of this, business lists have done a superior job of capturing more than 98% of the buying power of the nation's myriad manufacturing and non-manufacturing industries, and this valuable storehouse of information can be used to help business marketers prioritize and segment their targeted markets based on solid and verifiable research.

PIECES OF THE PIE

In order to stay competitive, today's business-to-business marketers understand that they must make a special effort to segment markets and allocate the proper resources against those key markets. When done with care and precision, this kind of segmentation should allow a business marketer to answer the following questions:

- What are my markets?
- How many buying points are there in my market?
- What is my penetration in terms of the number of available customers?
- What is my market share in relation to the total dollar value of shipments in each segment?

Realistically speaking, even such well-defined markets are still complex entities, and within each of these definitions, there will be a certain num-

ber of companies with multiple buying points, different business circumstances and strategies, different purchasing policies, and varying degrees of financial health.

In order to efficiently and optimally penetrate, occupy, and grow market share, common denominators must be established that will help define market segments and form a basis for effective communication and selling strategies. In most cases, these common denominators can be derived by the intelligent application of market data to your existing customer records.

By overlaying business characteristic data (annual shipments, number of employees, headquarters or branch status, age of company, etc.) on your customer records, you can determine which segments produce the highest average orders, the most consistent purchasing patterns, the shortest and longest collection periods, and other important indicators.

In addition, certain business-to-business marketing data specialists have lately developed highly efficient and user friendly desktop systems that can further assist marketing managers in this process of delineation. For example, by combining the existing wealth of customer-oriented data with your own billing statistics, some truly wonderful things begin to emerge from the previously murky customer file. At the touch of a key, your customers appear before you arrayed statistically by SIC code, size, or geography. Touch another key and the same customers are clustered into meaningful revenue segments, providing an instant statistical appraisal of your high and low potential markets.

By using such systems, you can easily determine, for example, that your 195 chemical manufacturing customers are only 10% of the 1,950 prospects that exist in your geographical market. Of course, the most difficult part of this process is the compilation of a "clean" customer file for use in overlaying external demographic data before beginning your analysis.

The manufacturing and service sector statistics contained in both the "U.S. Totals for 4-digit SIC Industries" (see page 138) and the more detailed state and county data available on request from Dun's Marketing Services (see box, page 134) offer a perfect starting point for analyzing your business-to-business market penetration.

SUPPLEMENT HIGHLIGHT

Top 10 Manufacturing Industries

SIC	Industry	Total Shipments (Mil.)	Total Employment
3714	Motor vehicle parts & accessories	$37,857	423,002
2911	Petroleum refining	34,431	79,786
3711	Motor vehicles & passenger car bodies	34,308	288,237
3089	Plastics products n.e.c.	30,671	424,319
3571	Electronic computers	29,023	172,856
3721	Aircraft manufacturing	28,555	285,744
2752	Commercial lithographic printing	26,328	434,913
3312	Blast furnaces & steel mills	23,038	211,802
3674	Semiconductors & related devices	20,869	199,181
3812	Search & navigation equipment	19,917	238,148

According to recent figures, a face-to-face industrial sales call can cost as much as $300 these days.

These statistics, which between 1974 and 1988 appeared in Sales & Marketing Management's annual *Survey of Industrial & Commercial Buying Power*, have been used consistently by those in the business marketing community, and when the *SICBP* was discontinued in 1989, arrangements were made with Dun's to produce an identical volume of statistics that would allow S&MM to continue to offer these data to its readers.

PUTTING THE NUMBERS TO WORK

Of the hundreds of business marketers who contacted us last year requesting a copy of these numbers for their planning use, 35% were involved in manufacturing, 12% in publishing, 10% in marketing consulting, 10% in research/libraries, 8% in financial institutions, and 5% in software marketing. This broad cross-section of users illustrates the equally broad range of applications these statistics offer.

Here are just a few of the many examples of how these data have been utilized:

- A manufacturer of industrial metals used this information to get "a general feel for the size of a particular market" where it was suspected that penetration was limited. The data helped them determine potential within certain target markets on a state-by-state basis.
- A market analyst for an electrical

SUPPLEMENT HIGHLIGHT

Top 10 Non-Manufacturing & Service Industries

SIC	Industry	Total Receipts (Mil.)	Total Employment
8062	General medical & surgical hospitals	$189,309	3,966,254
8211	Elementary & secondary schools	176,712	5,652,778
4911	Electric services	129,500	468,895
8221	Colleges & universities	99,404	1,898,473
8011	Offices & clinics of medical doctors	79,101	1,111,377
6531	Real estate agents & managers	69,421	598,655
4813	Nonradio telephone communications	51,779	486,821
8111	Legal services	50,739	828,594
7011	Hotels & motels	49,892	1,415,624
6411	Insurance agents, brokers & services	49,097	635,592

At the touch of a key, your customers appear before you arrayed statistically by SIC code, size, or geography.

machinery company found the data very useful in the preparation of in-house reports on trends in their industry. This information was then used for strategic planning purposes.

- A major midwestern office products manufacturer used these statistics to assign sales potential to targeted markets and to forecast demand for their manufacturing planning.
- A midwestern state's economic development director, charged with attracting hi-tech companies to the state, used the statistics to persuade state legislators of the importance of creating incentives to attract new business.
- The advertising manager of a business publication used these statistics to substantiate its coverage of certain industries, including the number of companies in those industries, the number of employees, and the dollar value of shipments/receipts.
- A consulting company found the data indispensable in setting up sales territories and quotas for an industrial client.

With these examples as a basic guideline, we hope you'll find these statistics to be equally useful for your own business-to-business marketing purposes—whatever they might be. And when you're ready to take that all-important next step to investigate the other methods available for analyzing your customers, as well as your market position, penetration, and prospecting potential, keep in mind *Sales & Marketing Management* and Dun's Marketing Services. □

Gerald Reisberg is vice president of advertising and communications at Dun's Marketing Services, Parsippany, N.J.

State and County Data

If you would like to receive additional county-level data on establishment counts, shipments/receipts, % of total U.S. shipments/receipts, and the % of shipments/receipts in large establishments, write us at *Sales & Marketing Management*, 633 Third Ave., New York, N.Y. 10017, or call 212-984-2434.

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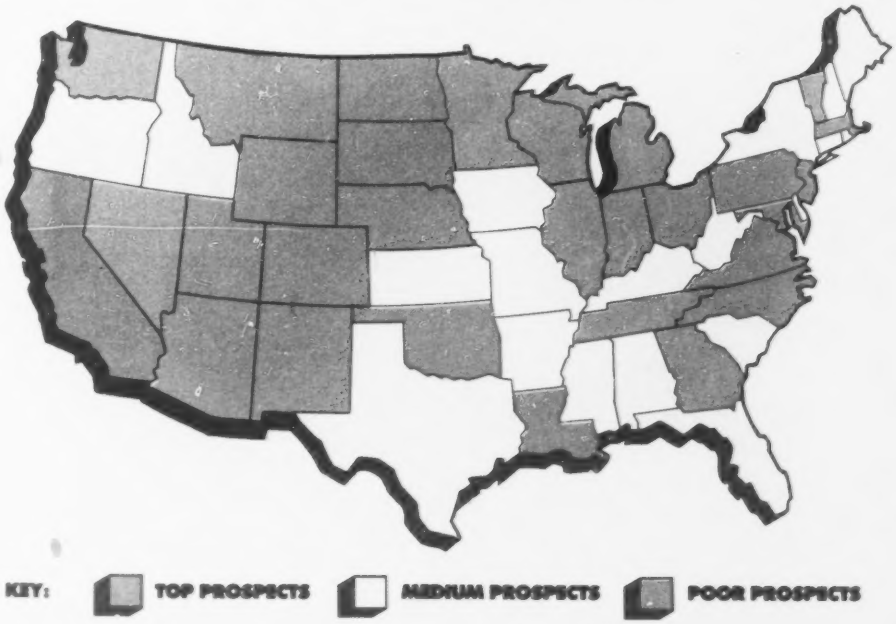
Who Your Potential Customers Are: A Marketing Application

Some practical advice on how to use industrial statistics to analyze your business-to-business prospects.



BY SAMUEL GILBERT

Readers have their choice of several different marketing applications with the data provided in this Special Supplement. Those who demand a thorough understanding of the current business environment will find these statistics to be an informative analytical tool, since the reports enable you to identify, for example, how well your company has penetrated its key markets, as well as how to analyze their size and relative productivity.

Undoubtedly, a pressing concern of business-to-business marketers is identifying new market segments or industry groups that can be targeted as prospects. In order to get a rough idea of who these prospects are, you'll need to consider both geographic and industry-specific information. Of primary importance is the size of a market segment in a given geographic area, such as a metro, county, or state. Whichever geographic indicator you choose, remember that the prospect group should be large enough to justify the cost of a marketing campaign.

Another key consideration is an industry's strength in the local economy. One way to measure this is to look at the share of local output generated by the targeted prospects relative to the entire industry's share at the national level. When combined, these two elements should allow you to identify an industry group that is both large (in absolute terms) and a major player within the targeted area. Taken together, these measures can provide you with the basis for a more cost-effective marketing effort.

The data needed to conduct an analysis of this sort are already contained in the U.S. Totals for 4-Digit Industries in this Special Supplement and in the State and County Summaries available by request from Dun's Marketing Services (see box, page 134). As a general illustration of this methodology, let's consider the market potential of all 4-digit manufacturing industries (SIC 2000-3999) in each of the 48 contiguous states.

The first thing we need to look at is market size. In this case, we'll use the total output of the manufacturing sector, measured by the dollar volume of shipments/receipts. Naturally, the results here are not all that surprising: California, New York, and

Ohio post the largest dollar value of manufacturing shipments, with Nevada, Montana, and South Dakota at the bottom of the 48-state list.

Next, you'll need to calculate the share of local economic output accounted for by manufacturing. This can be done by constructing the following ratio, commonly referred to as a Location Quotient (LQ):

$$\frac{\text{Total manufacturing shipments \$ (State)}}{\text{Total all shipments/receipts \$ (State)}} = X$$

$$\frac{\text{Total manufacturing shipments \$ (U.S.)}}{\text{Total all shipments/receipts \$ (U.S.)}} = Y$$

$$\frac{X}{Y} = \text{Location Quotient}$$

Roughly speaking, an LQ figure greater than 1.0 means that manufacturing industries account for a larger-than-average share of state output. North Carolina, with a 1.32 ratio, is a good example of this. Other state leaders include Michigan, Illinois, and Georgia. States claiming a smaller-than-average share of manufacturing are Vermont, New Mexico, and Wyoming.

Now that we've obtained both measures, the next question is how they can be used to identify prospects. One way is to rank all 48 states in order of their total manufacturing output. With this information in hand, you can prioritize your markets according to their potential. Generally, those states that rank in the upper third of this list might be considered top prospects, since their LQs are in excess of 1.0. Manufacturing establishments in states that comprise the bottom third of this list—those with a lower-than-average share of manufacturing output—might be labeled poor prospects, while the remaining states would be designated as medium prospects.

The U.S. map (left) enables you to tell at a glance which states fall into each of these three categories. In sum, this analysis offers a good starting point for identifying those market areas that may have a greater demand for your product. These kinds of applications will enable you to choose strategies that will lead to a more efficient method for capturing these prospects and turning them into solid customers. □

Samuel Gilbert is a research associate with Dun's Marketing Services.

SUPPLEMENT HIGHLIGHT

Top 15 Counties in Manufacturing Activity

County/State	Total Shipments ($ Mil.)
Los Angeles, CA	$71,055.1
Cook, IL	$45,098.2
Santa Clara, CA	$26,398.4
Orange, CA	$23,713.2
Dallas, TX	$19,003.9
New York, NY	$18,683.9
Harris, TX	$18,613.8
Middlesex, MA	$17,521.1
Wayne, MI	$17,300.9
Cuyahoga, OH	$16,352.2
San Diego, CA	$15,538.1
Hennepin, MN	$14,244.0
Maricopa, AZ	$12,216.1
King, WA	$11,971.1
New Castle, DE	$11,163.4

SUPPLEMENT HIGHLIGHT

Top 15 Counties in Non-Manufacturing & Service Activity

County/State	Total Receipts ($ Mil.)
Los Angeles, CA	$92,595.8
New York, NY	$76,280.9
Cook, IL	$68,557.2
Harris, TX	$37,590.5
Dallas, TX	$31,766.5
Orange, CA	$23,184.3
San Francisco, CA	$22,139.2
Maricopa, AZ	$21,410.2
Dade, FL	$21,257.4
King, WA	$21,248.5
Philadelphia, PA	$20,920.4
Suffolk, MA	$20,253.0
San Diego, CA	$19,315.1
Washington, DC	$18,809.3
Cuyahoga, OH	$18,575.5

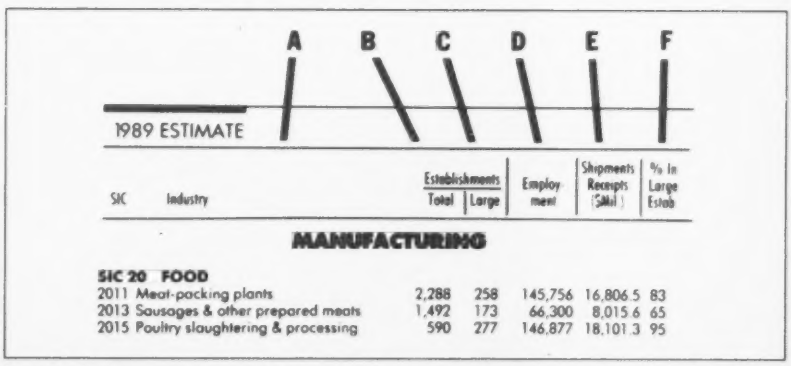
Data Supplement: U.S. Totals for 4-Digit SIC Industries

A statistical overview of the nation's economic output, showing establishment, employment, and shipment/receipt totals for more than 700 individual industries.

A. The 2-digit and 4-digit Standard Industrial Classification (SIC) codes listed here conform to the January 1987 revisions to the SIC system. Briefly, this system was developed by the federal government to facilitate the collection and dissemination of data pertaining to all business and industrial activity in the U.S. The 2-digit level of detail, commonly referred to as **Major Groups**, describes general manufacturing (Major Groups 20 through 39) and non-manufacturing categories (Major Groups 40-49; 60-67; 70-79; and 80-89). For each Major Group, a number of 4-digit SIC codes, called **Specific Industries**, are listed, along with their industry definitions. These describe the various types of industrial activity that make up the larger Major Group designation.

B. The **Total Establishments** figure shows the number of all business establishments primarily engaged in this particular 4-digit industry.

C. Large Establishments are defined as those with 100 or more employees, and this figure can be used to ascertain the number of "key prospects" in any given industry. This is because larger establishments tend to account for a majority of all activity in a specific 4-digit category, as evidenced by the "% in Large Establishments" figure in column **F**.



SIC	Industry	Establishments: Total	Establishments: Large	Employment	Shipments/Receipts ($Mil.)	% in Large Estab.
	MANUFACTURING					
SIC 20	**FOOD**					
2011	Meat-packing plants	2,288	258	145,756	16,806.5	83
2013	Sausages & other prepared meats	1,492	173	66,300	8,015.6	65
2015	Poultry slaughtering & processing	590	277	146,877	18,101.3	95

D. The **Employment** figure shows total U.S. employment for all establishments in each 4-digit industry.

E. The **Shipments/Receipts** figure, shown here in millions of dollars, records the dollar value of all goods produced (in manufacturing industries) or services rendered (in non-manufacturing and service industries). The term "Shipments" is commonly used in manufacturing, while "Receipts" pertain to non-manufacturing industries.

F. The portion of a 4-digit industry's Shipments/Receipts generated by the number of Large Establishments shown in column **C** is listed here under the heading of **% in Large Establishments**. This figure immediately tells you what percentage of an industry's total business volume is accounted for by establishments employing 100 or more people, allowing you to concentrate your selling efforts more efficiently. ▶

State and County Data

If you would like to receive state- and county-level data on establishments, the dollar value of shipments/receipts, % of total U.S. shipments/receipts, and the % of shipments/receipts in large establishments, write us at *Sales & Marketing Management*, 633 Third Ave., New York, N.Y. 10017, or call 212-984-2434.

1989 ESTIMATE

SIC	Industry	Establishments Total	Establishments Large	Employment	Shipments Receipts $Mil	% In Large Estab
	MANUFACTURING					
	SIC 20 FOOD					
2011	Meat-packing plants	2,288	258	145,756	16,806.5	83
2013	Sausages & other prepared meats	1,492	173	66,300	8,015.6	65
2015	Poultry slaughtering & processing	590	277	146,877	18,101.3	95
2021	Creamery butter	91	11	4,201	2,057.0	57
2022	Natural & processed cheese	722	98	43,106	11,143.0	69
2023	Dry, condensed, etc. dairy products	198	25	12,149	3,675.5	64
2024	Ice cream & frozen desserts	721	64	22,994	2,102.8	54
2026	Fluid milk	920	247	63,529	12,177.7	76
2032	Canned specialties	307	54	31,141	3,137.2	88
2033	Canned fruits & vegetables	949	173	66,032	11,459.3	77
2034	Dehydrated fruits, vegetables & soups	202	39	17,933	2,661.8	86
2035	Pickles, sauces & salad dressings	533	61	22,444	2,469.2	70
2037	Frozen fruits & vegetables	298	94	36,830	4,910.7	87
2038	Frozen food specialties n.e.c.	541	105	49,066	3,721.2	83
2041	Flour & other grain mill products	492	54	20,106	3,628.8	59
2043	Cereal breakfast foods	77	31	21,427	2,274.6	96
2044	Rice milling	86	19	4,861	1,106.2	67
2045	Prepared flour mixes & doughs	170	24	8,593	984.0	71
2046	Wet corn milling	83	19	7,422	1,919.3	83
2047	Dog & cat food	250	46	15,103	2,229.2	77
2048	Prepared feeds n.e.c.	1,945	54	40,352	8,088.0	29
2051	Bread, cake & related products	3,103	449	175,942	9,038.0	75
2052	Cookies & crackers	543	93	47,486	3,069.4	84
2053	Frozen bakery products, except bread	73	19	6,466	632.9	82
2061	Cane sugar, except refining	56	18	5,509	1,341.9	81
2062	Cane sugar refining	45	20	10,287	3,348.0	95
2063	Beet sugar	67	28	7,695	1,784.1	82
2064	Candy & other confectionery products	1,187	106	41,785	2,399.2	68
2066	Chocolate & cocoa products	258	27	15,147	1,304.5	78
2067	Chewing gum	27	17	9,458	1,262.4	97
2068	Salted & roasted nuts & seeds	90	13	4,715	909.1	66
2074	Cottonseed oil mills	62	15	4,304	779.2	63
2075	Soybean oil mills	113	20	7,302	438.1	67
2076	Vegetable oil mills n.e.c.	44	2	947	302.4	24
2077	Animal & marine fats & oils	312	13	8,178	963.9	30
2079	Edible fats & oils n.e.c.	139	45	11,848	4,683.2	79
2082	Malt beverages	181	43	37,633	3,785.3	94
2083	Malt	34	4	1,452	429.3	38
2084	Wines, brandy, & brandy spirits	82	14	12,612	1,226.8	34
2085	Distilled & blended liquors	126	29	11,912	3,931.4	81
2086	Bottled & canned soft drinks	1,738	238	90,221	12,261.3	53
2087	Flavoring extracts & syrups n.e.c.	480	21	17,012	2,820.6	57
2091	Canned & cured fish & seafoods	318	42	21,723	3,268.0	76
2092	Fresh or frozen prepared fish	625	76	29,822	3,976.3	65
2095	Roasted coffee	213	38	13,172	2,071.8	73
2096	Potato chips & similar snacks	340	78	28,831	2,321.6	81
2097	Manufactured ice	810	0	6,221	370.9	0
2098	Macaroni & spaghetti	302	27	9,752	667.5	59
2099	Food preparations n.e.c.	2,327	201	84,408	6,993.9	60
	SIC 21 TOBACCO					
2111	Cigarettes	46	21	34,131	703.3	99
2121	Cigars	55	17	2,664	97.7	66
2131	Chewing & smoking tobacco & snuff	59	9	3,521	527.8	66
2141	Tobacco stemming & redrying	34	9	3,986	521.1	80
	SIC 22 TEXTILE-MILL PRODUCTS					
2211	Cotton-weaving mills	1,277	173	77,329	4,652.0	80
2221	Synthetics- & silk-weaving mills	897	150	63,316	4,223.7	84
2231	Wool-fabric weaving & finishing mills	277	37	15,137	1,343.8	68
2241	Narrow-fabric weaving & braiding mills	566	45	20,371	1,405.9	47
2251	Women's hosiery, except socks	230	77	35,355	2,163.3	89
2252	Hosiery n.e.c.	503	109	38,049	2,010.2	76
2253	Knit outerwear mills	1,643	222	94,553	8,247.0	72
2254	Knit underwear mills	110	46	25,047	2,088.8	93
2257	Weft knit fabric mills	199	48	13,183	1,753.7	71
2258	Lace & warp knit fabric mills	243	49	18,461	2,102.6	76
2259	Knitting mills n.e.c.	105	15	7,697	439.8	78
2261	Cotton-finishing plants	1,267	98	42,474	2,511.1	71
2262	Synthetics- & silk-finishing plants	597	36	13,696	762.5	50
2269	Textile-finishing n.e.c.	249	37	15,217	1,334.7	73
2273	Carpets & rugs	912	117	56,963	6,779.2	77
2281	Yarn-spinning mills	414	224	77,388	5,784.2	94
2282	Yarn-throwing & winding mills	160	42	18,939	1,528.6	84
2284	Thread mills	115	32	10,053	918.0	88
2295	Coated fabrics, not rubberized	268	32	15,649	1,779.9	67
2296	Tire cord & fabrics	25	17	7,433	412.0	99
2297	Nonwoven fabrics	88	22	7,491	886.7	74
2298	Cordage & twine	293	22	8,142	624.2	45
2299	Textile goods n.e.c.	530	71	27,280	2,604.0	67
	SIC 23 APPAREL					
2311	Men's & boys' suits & coats	615	181	68,778	5,897.5	89

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SIC	Industry	Establishments Total	Establishments Large	Employment	Shipments Receipts $Mil	% In Large Estab
2321	Men's & boys' shirts	877	241	78,510	3,847.5	83
2322	Men's & boys' underwear & nightwear	131	56	26,027	1,169.9	94
2323	Men's & boys' neckwear	256	27	9,671	774.7	55
2325	Men's & boys' trousers & slacks	548	266	88,922	2,794.7	93
2326	Men's & boys' work clothing	344	132	39,020	2,583.2	86
2329	Men's & boys' clothing n.e.c.	1,597	237	83,951	3,883.7	69
2331	Women's & misses' blouses & shirts	1,463	154	52,600	2,051.4	52
2335	Women's & misses' dresses	2,416	140	69,686	3,653.4	40
2337	Women's & misses' suits & coats	907	96	35,479	1,436.8	45
2339	Women's & misses' outerwear n.e.c.	3,610	397	143,357	9,557.2	61
2341	Women's & children's underwear	721	217	67,478	4,413.6	82
2342	Brassieres, girdles & allied garments	171	56	18,499	1,200.8	84
2353	Hats, caps & millinery	498	49	17,623	872.3	60
2361	Girls' & children's dresses & blouses	705	92	31,137	2,047.3	66
2369	Girls' & children's outerwear n.e.c.	588	92	30,767	2,304.7	74
2371	Fur goods	483	0	2,258	374.4	0
2381	Fabric dress & work gloves	124	25	7,915	395.8	66
2384	Robes & dressing gowns	133	28	9,026	361.4	77
2385	Waterproof outerwear	135	20	7,115	436.6	71
2386	Leather- & sheep-lined clothing	318	7	5,062	573.1	34
2387	Apparel belts	401	26	10,543	750.1	40
2389	Apparel & accessories n.e.c.	529	34	14,647	798.4	52
2391	Curtains & draperies	1,915	64	32,030	1,128.5	52
2392	Housefurnishings	1,441	130	50,858	2,712.5	64
2393	Textile bags	409	27	12,741	654.9	43
2394	Canvas & related products	1,945	23	22,603	1,120.1	31
2395	Pleating, stitching & tucking	1,042	27	15,525	654.4	30
2396	Automotive & apparel trimmings	1,718	57	31,199	1,798.8	46
2397	Schiffli-machine embroideries	226	6	3,736	204.4	36
2399	Fabricated textile products	1,097	74	29,525	1,505.4	56
	SIC 24 LUMBER & WOOD PRODUCTS					
2411	Logging	6,764	28	49,999	3,789.5	10
2421	General sawmills & planing mills	5,057	361	157,599	11,863.4	51
2426	Hardware dimensions & flooring mills	1,134	99	38,745	2,286.2	48
2429	Special-product sawmills n.e.c.	273	6	3,212	245.0	22
2431	Millwork	5,229	202	118,090	9,182.3	46
2434	Wood kitchen cabinets	6,522	130	76,592	4,080.3	38
2435	Hardwood veneer & plywood	395	99	33,469	2,692.8	74
2436	Softwood veneer & plywood	171	69	28,897	3,470.3	90
2439	Structural wood members n.e.c.	1,045	34	24,706	2,139.5	21
2441	Nailed & lock-corner wood boxes	401	6	6,220	338.7	13
2448	Wood pallets & skids	1,932	14	27,556	1,562.6	7
2449	Wood containers n.e.c.	500	25	10,985	591.9	45
2451	Mobile homes	483	186	42,874	4,404.8	81
2452	Prefabricated wood buildings	1,112	71	37,254	4,151.9	62
2491	Wood preserving	577	18	12,908	2,031.7	21
2493	Reconstituted wood products	327	73	19,576	1,809.0	75
2499	Wood products n.e.c.	3,835	96	57,173	2,632.6	38
	SIC 25 FURNITURE					
2511	Unupholstered wood household furniture	4,113	292	138,058	7,001.5	70
2512	Upholstered household furniture	1,908	255	103,502	5,430.1	72
2514	Metal household furniture	555	84	29,326	2,217.2	73
2515	Mattresses & bedsprings	1,100	67	30,137	2,269.0	39
2517	Wood TV & radio cabinets	126	18	6,790	343.1	78
2519	Household furniture n.e.c.	643	29	13,179	817.4	50
2521	Wood office furniture	1,380	105	47,018	2,838.6	62
2522	Office furniture, except wood	486	89	46,182	3,892.9	83
2531	Public building & related furniture	609	83	30,745	1,901.3	70
2541	Wood partitions & fixtures	2,534	176	44,051	2,794.2	33
2542	Partitions & fixtures	1,144	134	48,406	3,877.7	63
2591	Drapery hardware & blinds & shades	950	56	27,872	1,923.7	62
2599	Furniture & fixtures n.e.c.	868	42	23,313	1,598.0	51
	SIC 26 PAPER					
2611	Pulp mills	187	45	15,147	2,526.3	83
2621	Paper mills	1,249	282	137,922	19,164.1	82
2631	Paperboard mills	679	153	57,169	7,193.1	70
2652	Setup paperboard boxes	286	51	16,845	1,065.6	57
2653	Corrugated & solid fiber boxes	1,968	499	121,356	13,123.7	63
2655	Fiber cans, drums & tubes	348	45	19,263	1,411.8	54
2656	Sanitary food containers	113	41	16,745	1,949.3	86
2657	Folding paperboard boxes	213	55	14,276	1,337.6	67
2671	Coated & laminated packaging paper	227	48	17,323	2,417.9	73
2672	Coated & laminated paper n.e.c.	642	83	52,442	5,695.2	81
2673	Plastics, foil & coated paper bags	531	67	27,386	3,194.5	61
2674	Uncoated paper & multiwall bags	152	46	13,646	1,577.7	77
2675	Die-cut paper & board	328	32	12,646	865.5	65
2676	Sanitary paper products	132	47	21,761	3,342.8	90
2677	Envelopes	242	81	21,062	1,756.6	76
2678	Stationery & related products	223	45	17,632	1,349.5	84
2679	Converted paper products n.e.c.	897	102	40,405	4,014.4	62
	SIC 27 PRINTING & PUBLISHING					
2711	Newspapers	10,622	873	476,422	17,205.0	70

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SIC	Industry	Establishments Total	Establishments Large	Employment	Shipments Receipts $Mil	% In Large Estab
2721	Periodicals	6,224	163	118,530	11,157.3	43
2731	Book publishing	4,810	202	116,089	9,032.4	66
2732	Book printing	413	54	21,754	1,530.6	80
2741	Miscellaneous publishing	4,903	106	73,532	5,288.3	36
2752	Commercial lithographic printing	35,585	579	434,913	26,328.3	30
2754	Commercial gravure printing	866	40	21,523	1,530.0	57
2759	Commercial printing n.e.c.	12,457	192	137,369	6,792.6	38
2761	Manifold business forms	880	121	43,115	4,291.4	62
2771	Greeting cards	378	29	22,295	1,548.2	87
2782	Blankbooks & looseleaf binders	630	116	37,046	2,460.7	68
2789	Bookbinding & related work	1,224	51	30,766	1,242.1	41
2791	Typesetting	4,315	32	38,219	1,567.7	14
2796	Platemaking & related services	1,183	34	22,197	1,408.6	26
SIC 28	**CHEMICALS**					
2812	Alkalies & chlorine	108	16	7,309	1,585.1	71
2813	Industrial gases	611	12	14,086	1,784.2	35
2816	Inorganic pigments	131	8	4,570	760.1	36
2819	Industrial inorganic chemicals	1,727	112	74,650	10,679.4	63
2821	Plastics materials & synthetic resins	1,455	165	83,791	12,883.0	64
2822	Synthetic rubber	176	31	11,945	1,240.9	71
2823	Cellulosic manmade fibers	35	6	3,473	412.4	81
2824	Manmade organic fibers	154	40	32,405	4,049.9	92
2833	Medicinals & botanicals	464	39	23,721	2,819.7	68
2834	Pharmaceutical preparations	1,449	261	147,261	18,884.9	85
2835	Diagnostic substances	133	9	4,503	399.1	46
2836	Nondiagnostic biological products	253	15	8,182	618.0	52
2841	Soap & other detergents	635	43	29,117	3,143.5	75
2842	Polishes & sanitary products	1,795	35	33,578	3,471.9	30
2843	Surface active agents	159	7	3,564	602.6	34
2844	Toilet preparations	1,614	121	61,546	6,755.8	67
2851	Paints & allied products	1,810	163	70,877	9,139.1	56
2861	Gum & wood chemicals	128	11	4,860	658.2	57
2865	Cyclic crudes & intermediates	288	35	15,762	2,957.0	65
2869	Industrial organic chemicals n.e.c.	1,055	126	113,111	18,630.6	84
2873	Nitrogenous fertilizers	468	16	9,376	2,048.7	31
2874	Phosphatic fertilizers	201	8	4,167	1,121.1	41
2875	Fertilizers, mixing only	457	3	5,073	1,056.3	11
2879	Agricultural chemicals n.e.c.	601	46	24,172	3,588.5	69
2891	Adhesives & sealants	989	33	23,761	3,279.3	29
2892	Explosives	187	17	8,894	1,012.3	68
2893	Printing ink	584	7	10,983	1,484.6	9
2895	Carbon black	40	3	1,705	759.6	21
2899	Chemical preparations n.e.c.	2,097	75	46,036	5,557.6	40
SIC 29	**PETROLEUM REFINING & COAL PRODUCTS**					
2911	Petroleum refining	1,355	125	79,786	34,430.7	75
2951	Asphalt paving mixtures & blocks	880	17	13,496	3,381.0	25
2952	Asphalt felts & coatings	343	55	13,726	2,340.7	66
2992	Lubricating oils & greases	604	28	14,495	2,451.4	32
2999	Petroleum & coal products n.e.c.	58	2	1,410	273.1	19
SIC 30	**RUBBER & MISCELLANEOUS PLASTICS**					
3011	Tires & inner tubes	263	84	83,155	9,740.4	97
3021	Rubber & plastics footwear	96	32	13,072	713.2	93
3052	Rubber & plastics hose & belting	331	54	26,113	2,647.9	78
3053	Gaskets, packing & sealing devices	623	62	30,941	2,692.2	63
3061	Mechanical rubber goods	163	19	8,325	540.3	60
3069	Fabricated rubber products n.e.c.	2,127	209	99,384	9,037.6	57
3081	Unsupported plastics film & sheets	850	156	48,425	6,498.0	66
3082	Unsupported plastics profile shapes	239	23	8,833	636.4	54
3083	Laminated plastics plate & sheet	591	72	26,306	2,023.3	64
3084	Plastics pipe	309	32	14,510	2,331.9	39
3085	Plastics bottles	262	76	21,067	2,365.7	72
3086	Plastics foam products	1,082	111	45,959	4,717.0	58
3087	Custom compounding of resins	94	5	2,932	328.8	39
3088	Plastics plumbing fixtures	343	37	12,634	1,063.2	54
3089	Plastics products n.e.c.	9,796	1,206	424,319	30,670.6	61
SIC 31	**LEATHER**					
3111	Leather tanning & finishing	510	42	17,334	2,304.8	54
3131	Boot & shoe cut stock & findings	148	14	5,779	335.3	54
3142	House slippers	49	14	4,184	189.5	85
3143	Men's nonathletic footwear	285	108	47,707	2,902.0	95
3144	Women's nonathletic footwear	155	51	17,805	1,117.8	86
3149	Nonrubber footwear n.e.c.	174	48	15,741	964.6	89
3151	Leather gloves & mittens	76	11	3,398	159.2	56
3161	Luggage	443	38	14,384	826.2	53
3171	Women's handbags & purses	427	29	10,788	551.2	58
3172	Personal leather goods	432	28	10,859	457.4	58
3199	Leather goods n.e.c.	810	16	9,142	347.0	27
SIC 32	**STONE, CLAY, GLASS & CONCRETE**					
3211	Flat glass	521	37	15,467	1,426.1	58
3221	Glass containers	153	84	30,722	3,262.9	96
3229	Pressed & blown glass n.e.c.	816	63	50,874	2,928.3	84

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SIC	Industry	Establishments Total	Establishments Large	Employment	Shipments Receipts $Mil	% In Large Estab
3231	Products of purchased glass	2,193	122	53,648	2,891.8	61
3241	Hydraulic cement	330	68	20,484	3,796.8	65
3251	Brick & structural clay tile	290	49	15,963	1,085.9	57
3253	Ceramic wall & floor tile	233	34	12,867	643.9	82
3255	Clay refractories	238	27	10,209	896.4	53
3259	Structural clay products n.e.c.	81	7	2,255	173.2	49
3261	Vitreous plumbing fixtures	100	22	8,847	601.0	82
3262	Vitreous china table & kitchen articles	45	16	7,803	469.1	91
3263	Semivitreous tablewear & kitchenwear	43	5	3,201	165.4	91
3264	Porcelain electric supplies	117	33	11,123	768.0	82
3269	Pottery products n.e.c.	1,243	26	14,832	426.5	41
3271	Concrete block & brick	1,035	20	20,407	2,135.3	17
3272	Concrete products, except block & brick	3,970	159	77,561	5,428.9	34
3273	Ready-mixed concrete	4,734	84	75,546	964.1	20
3274	Lime	110	16	4,325	450.5	55
3275	Gypsum products	188	67	14,976	2,015.9	80
3281	Cut stone & stone products	1,662	10	13,383	764.5	15
3291	Abrasive products	469	29	21,502	1,823.4	59
3292	Asbestos products	157	21	7,709	667.4	59
3295	Ground or treated minerals & earths	432	15	10,169	1,268.0	22
3296	Mineral wool	333	45	23,325	2,156.2	72
3297	Nonclay refractories	170	11	6,317	931.7	33
3299	Nonmetallic mineral products n.e.c.	614	9	8,391	448.7	23
SIC 33	**PRIMARY METAL**					
3312	Steel works, blast furnaces & rolling mills	1,941	238	211,802	23,038.3	87
3313	Electrometallurgical products	86	16	4,630	968.8	65
3315	Steel wiredrawing & steel nails & spikes	493	58	23,165	2,700.6	57
3316	Cold-rolled steel sheet, strip & bars	297	37	15,563	2,750.2	58
3317	Steel pipe & tubes	305	52	17,368	2,581.2	60
3321	Gray & ductile iron foundries	774	202	95,730	6,283.0	85
3322	Malleable iron foundries	64	21	8,685	645.9	86
3324	Steel investment foundries	97	26	12,135	755.1	81
3325	Steel foundries n.e.c.	357	75	35,467	2,790.4	81
3331	Primary smelting & refining of copper	24	9	2,393	337.3	85
3334	Primary production of aluminum	92	27	15,444	3,261.7	92
3339	Primary nonferrous metals n.e.c.	240	20	15,543	4,550.9	79
3341	Secondary nonferrous metals	587	17	13,314	3,280.0	36
3351	Copper rolling, drawing & extruding	218	83	27,398	4,421.1	87
3353	Aluminum sheet, plate & foil	155	42	22,315	3,958.8	91
3354	Aluminum extruded products	288	103	39,026	4,809.1	89
3355	Aluminum rolling & drawing n.e.c.	111	28	11,018	1,562.8	82
3356	Nonferrous rolling, drawing & extruding	272	44	16,641	2,802.2	74
3357	Nonferrous wiredrawing & insulating	475	134	65,228	7,849.9	86
3363	Aluminum die-castings	517	57	23,894	1,709.3	46
3364	Nonferrous die-castings	349	20	15,708	1,207.5	55
3365	Aluminum foundries	663	44	19,862	1,213.9	46
3366	Copper foundries	447	12	9,332	561.5	33
3369	Nonferrous foundries	423	19	15,713	1,085.4	51
3398	Metal heat treating	706	15	15,108	1,022.0	15
3399	Primary metal products n.e.c.	290	34	14,584	1,632.8	57
SIC 34	**FABRICATED METAL**					
3411	Metal cans	419	176	51,571	6,627.3	86
3412	Metal shipping barrels, drums & pails	175	30	8,706	956.6	53
3421	Cutlery	225	34	11,506	725.8	81
3423	Hand & edge tools	1,049	100	39,884	2,794.1	69
3425	Saw blades & handsaws	187	24	8,418	580.1	71
3429	Hardware n.e.c.	1,921	199	91,543	7,107.2	72
3431	Enameled iron & metal sanitary ware	172	17	9,716	794.7	74
3432	Plumbing fixture fittings & trim	301	43	15,271	1,568.4	65
3433	Heating equipment, except electric	821	40	21,956	2,052.3	54
3441	Fabricated structural metal	4,031	119	90,520	8,289.6	25
3442	Metal doors, sash & trim	2,506	178	81,602	6,199.0	50
3443	Fabricated plate work (boiler shops)	2,387	186	96,649	8,444.7	54
3444	Sheet metal work	4,845	116	100,997	7,479.4	23
3446	Architectural & ornamental metal work	3,009	34	32,958	2,037.8	18
3448	Prefabricated metal buildings	963	57	26,007	2,867.1	43
3449	Miscellaneous structural metal work	383	15	8,045	720.3	29
3451	Screw machine products	1,746	58	42,230	2,492.8	23
3452	Bolts, nuts, screws, rivets & washers	882	108	42,930	4,088.3	60
3462	Iron & steel forgings	623	109	41,236	3,641.0	76
3463	Nonferrous forgings	129	25	12,712	1,309.9	80
3465	Automotive stampings	615	176	113,634	11,737.5	89
3466	Crowns & closures	44	15	5,495	563.7	87
3469	Metal stampings n.e.c.	3,525	264	128,647	9,249.1	50
3471	Plating & polishing	3,756	116	79,791	3,920.5	26
3479	Metal coating & allied services n.e.c.	2,364	90	55,268	2,980.8	38
3482	Small arms ammunition	162	16	12,991	671.6	93
3483	Ammunition, except small arms	107	39	36,216	3,511.0	97
3484	Small arms	289	26	22,917	1,543.9	87
3489	Ordnance & accessories n.e.c.	116	29	29,370	2,267.0	96
3491	Industrial valves	383	82	29,014	2,946.7	79
3492	Fluid power valves & hose fittings	217	43	12,023	1,196.3	75
3493	Steel springs, except wire	305	124	11,404	790.9	51
3494	Valve & pipe fittings, n.e.c.	853	151	75,850	7,511.0	81

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3495	Wire springs	317	34	11,872	738.7	47
3496	Miscellaneous fabricated wire products	1,556	147	55,324	4,246.8	52
3497	Metal foil & leaf	78	14	4,685	474.1	73
3498	Fabricated pipe & fittings	742	60	26,886	2,259.0	52
3499	Fabricated metal products n.e.c.	1,758	87	44,826	3,176.3	51
SIC 35	**INDUSTRIAL MACHINERY & EQUIPMENT**					
3511	Turbines & turbine generator sets	248	49	41,403	5,960.3	91
3519	Internal combustion engines n.e.c.	473	53	50,750	4,673.5	90
3523	Farm machinery & equipment	2,520	83	68,956	5,254.4	55
3524	Lawn & garden equipment	290	41	18,817	2,137.9	77
3531	Construction machinery & equipment	1,553	111	65,929	7,022.5	66
3532	Mining machinery & equipment	553	38	16,899	1,587.1	48
3533	Oil & gas field machinery	1,166	75	35,345	3,493.5	59
3534	Elevators & moving stairways	255	23	11,363	1,005.6	59
3535	Conveyors & conveying equipment	1,013	60	29,109	2,995.0	37
3536	Hoists, cranes & monorails	356	27	11,479	1,219.7	54
3537	Industrial trucks & tractors	759	58	30,052	2,719.4	58
3541	Metal-cutting machine tools	1,913	81	50,263	3,573.4	48
3542	Metal-forming machine tools	873	33	20,193	1,509.7	31
3543	Industrial patterns	877	2	7,652	390.4	8
3544	Special dies & tools, jigs & fixtures	8,003	46	105,174	6,159.5	10
3545	Machine tool accessories	2,730	70	56,639	3,623.9	27
3546	Power-driven handtools	311	39	17,347	1,828.5	77
3547	Rolling mill machinery & equipment	115	7	3,245	349.4	33
3548	Electric & gas welding equipment	337	26	16,725	1,571.5	67
3549	Metalworking machinery n.e.c.	476	9	10,378	906.2	23
3552	Textile machinery	785	41	21,141	1,515.2	44
3553	Woodworking machinery	469	25	12,222	954.3	44
3554	Paper industries machinery	400	68	25,754	2,538.8	72
3555	Printing trades machinery & equipment	990	74	35,949	2,968.9	59
3556	Food products machinery	951	92	32,579	3,163.4	55
3559	Special industry machinery n.e.c.	2,165	162	77,556	7,741.5	57
3561	Pumps & pumping equipment	840	105	42,291	4,750.4	69
3562	Ball & roller bearings	264	80	35,393	3,579.2	88
3563	Air & gas compressors	410	45	17,592	2,049.2	65
3564	Industrial & commercial fans & blowers	883	65	26,676	2,716.9	47
3565	Packaging machinery	626	48	21,031	1,949.6	46
3566	Speed changers, drives & gears	271	338	14,773	1,133.5	62
3567	Industrial-process furnaces & ovens	728	50	22,861	2,432.5	42
3568	Power-transmission equipment n.e.c.	295	38	16,164	1,402.5	65
3569	General industrial machinery n.e.c.	1,659	110	57,054	5,825.2	53
3571	Electronic computers	1,476	195	172,856	29,022.9	87
3572	Computer storage devices	456	58	29,922	5,192.5	73
3575	Computer terminals	403	38	18,962	2,995.9	69
3577	Computer peripheral equipment n.e.c.	2,165	134	88,522	13,227.0	64
3578	Calculating & accounting equipment	275	13	12,326	1,314.3	69
3579	Office machines n.e.c.	435	46	33,397	3,088.2	79
3581	Automatic vending machines	180	22	10,968	1,290.4	84
3582	Commercial laundry equipment	144	18	6,485	576.3	68
3585	Refrigeration & heating equipment	1,461	288	139,925	15,406.3	85
3586	Measuring & dispensing pumps	103	18	7,486	687.2	86
3589	Service industry machinery n.e.c.	1,780	122	54,534	6,540.5	56
3592	Carburetors, pistons, rings & valves	232	50	19,467	1,410.8	86
3593	Fluid power cylinders & actuators	173	16	6,584	483.2	55
3594	Fluid power pumps & motors	195	34	11,039	1,196.2	77
3596	Scales & balances, except laundry	201	16	6,315	564.5	58
3599	Industrial machinery n.e.c.	29,181	160	271,835	14,822.6	12
SIC 36	**ELECTRONIC & OTHER ELECTRIC EQUIPMENT**					
3612	Nonelectric transformers	627	90	39,751	2,899.1	69
3613	Switchgear & switchboard apparatus	1,097	96	41,938	3,602.0	61
3621	Motors & generators	1,003	175	80,768	6,835.8	79
3624	Carbon & graphite products	113	20	7,195	665.9	64
3625	Relays & industrial controls	1,596	148	70,936	6,188.0	67
3629	Electrical industrial apparatus n.e.c.	356	30	18,864	1,728.8	66
3631	Household cooking equipment	136	37	30,766	4,816.9	95
3632	Household refrigerators & freezers	61	21	22,822	3,124.8	97
3633	Household laundry equipment	41	13	19,016	1,869.6	98
3634	Electric housewares & fans	402	95	40,267	5,582.2	88
3635	Household vacuum cleaners	126	13	10,138	1,236.9	82
3639	Household appliances n.e.c.	173	19	15,437	1,066.4	85
3641	Electric lamp bulbs & tubes	303	60	26,380	2,005.1	85
3643	Current-carrying wiring devices	650	167	54,221	4,337.0	79
3644	Noncurrent-carrying wiring devices	278	59	21,635	1,788.9	74
3645	Residential electric lighting fixtures	892	92	35,387	2,536.3	65
3646	Commercial electric lighting fixtures	452	49	21,683	2,227.0	64
3647	Vehicular lighting equipment	136	26	11,397	865.5	79
3648	Lighting equipment n.e.c.	573	52	18,694	1,864.5	62
3651	Household audio & video equipment	1,031	46	33,573	3,580.3	59
3652	Prerecorded records & tapes	1,081	23	13,563	1,134.8	38
3661	Telephone & telegraph equipment	1,160	139	92,609	11,482.4	76
3663	Radio & TV communications equipment	1,793	172	141,322	13,876.8	79
3669	Communications equipment n.e.c.	955	45	39,405	4,085.8	65
3671	Electron tubes	142	31	29,085	2,249.4	92
3672	Printed circuit boards	1,802	170	77,491	5,438.9	53

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SIC	Industry	Establishments Total	Establishments Large	Employment	Shipments Receipts $Mil	% In Large Estab
3674	Semiconductors & related devices	1,694	279	199,181	20,869.2	86
3675	Electric capacitors	156	48	24,581	1,584.2	88
3676	Electronic resistors	77	20	7,256	325.2	77
3677	Electronic coils & transformers	472	51	21,589	1,192.9	53
3678	Electronic connectors	210	42	13,888	1,210.7	73
3679	Electronic components n.e.c.	3,379	417	214,533	15,425.4	72
3691	Storage batteries	293	75	25,969	2,521.3	89
3692	Dry & wet primary batteries	124	29	12,654	2,217.5	90
3694	Engine electrical equipment	640	123	65,093	4,106.1	87
3695	Magnetic & optical recording media	247	28	19,485	2,576.5	85
3699	Electrical equipment & supplies n.e.c.	1,904	180	102,589	10,046.7	75
SIC 37	**TRANSPORTATION EQUIPMENT**					
3711	Motor vehicles & passenger car bodies	1,045	156	288,237	34,308.3	96
3713	Truck & bus bodies	942	92	46,447	4,132.0	65
3714	Motor vehicles parts & accessories	4,337	723	423,002	37,857.4	85
3715	Truck trailers	726	54	31,409	2,617.9	66
3716	Motor homes	203	24	8,901	1,507.2	63
3721	Aircraft	371	81	285,744	28,554.7	99
3724	Aircraft engines & engine parts	597	162	195,408	16,905.5	96
3728	Aircraft parts & equipment n.e.c.	1,615	240	162,055	12,862.5	84
3731	Ship building & repairing	714	99	129,459	10,841.2	91
3732	Boat building & repairing	2,776	129	59,742	4,535.1	55
3743	Railroad equipment	259	54	24,955	2,737.4	81
3751	Motorcycles, bicycles & parts	466	9	7,892	609.5	52
3761	Guided missiles & space vehicles	137	49	146,182	15,986.8	99
3764	Space-propulsion units & parts	63	25	32,342	2,739.4	98
3769	Space-vehicle equipment n.e.c.	54	19	19,367	1,490.9	96
3792	Travel trailers & campers	680	57	19,527	1,451.4	60
3795	Tanks & tank components	43	13	20,223	2,126.9	97
3799	Transportation equipment n.e.c.	691	21	12,546	953.9	46
SIC 38	**INSTRUMENTS**					
3812	Search & navigation equipment	938	222	238,148	19,917.0	95
3821	Laboratory apparatus & furniture	494	38	18,536	1,573.0	61
3822	Environmental controls	712	73	39,710	3,784.9	73
3823	Industrial process-control instruments	1,924	124	72,932	7,203.4	58
3824	Fluid meters & counting devices	316	43	15,553	1,291.8	72
3825	Electricity-measuring instruments	1,506	145	70,214	5,967.8	67
3826	Laboratory analytical instruments	493	52	28,216	2,856.7	71
3827	Optical instruments & lenses	713	39	22,125	1,810.4	56
3829	Measuring & controlling devices n.e.c.	1,563	95	44,393	3,722.5	50
3841	Surgical & medical instruments	2,046	215	102,332	9,826.2	68
3842	Surgical appliances & supplies	2,582	165	73,438	5,492.2	59
3843	Dental equipment & supplies	892	22	15,053	903.2	36
3844	X-ray apparatus & tubes	200	13	6,217	818.4	55
3845	Electromedical equipment	350	44	23,003	2,515.4	75
3851	Ophthalmic goods	1,381	31	25,485	1,407.8	31
3861	Photographic equipment & supplies	1,298	127	98,657	9,163.2	82
3873	Watches, clocks, watchcase & parts	416	35	13,750	1,159.6	71
SIC 39	**MISCELLANEOUS MANUFACTURING**					
3911	Jewelry, precious metal	4,090	58	39,884	3,571.2	34
3914	Silverware & plated & stainless ware	505	13	6,606	330.7	39
3915	Jewelers materials & lapidary work	785	5	6,736	342.4	18
3931	Musical instruments	741	30	13,358	620.7	48
3942	Dolls & stuffed toys	627	9	7,260	290.4	34
3944	Games, toys & children's vehicles	1,852	44	29,741	2,019.5	49
3949	Sporting & athletic goods n.e.c.	4,028	72	57,091	3,814.8	33
3951	Pens & mechanical pencils	159	18	7,765	535.3	66
3952	Lead pencils & art goods	325	11	5,733	322.6	38
3953	Marking devices	1,120	6	10,528	422.4	7
3955	Carbon paper & inked ribbons	219	13	6,579	636.0	41
3961	Costume jewelry	1,506	28	20,709	1,143.0	29
3965	Fasteners, buttons, needles & pins	455	27	12,578	934.5	43
3991	Brooms & brushes	402	28	11,821	848.0	45
3993	Signs & advertising specialties	8,009	95	75,246	4,519.5	21
3995	Burial caskets	263	13	7,402	464.6	54
3996	Hard-surface floor coverings	35	10	7,984	774.4	95
3999	Manufacturing industries n.e.c.	4,672	125	69,490	3,937.9	42

TRANSPORTATION AND PUBLIC UTILITIES

SIC	Industry	Establishments Total	Establishments Large	Employment	Shipments Receipts $Mil	% In Large Estab
SIC 40	**RAILROADS**					
4011	Line-haul operating railroads	1,673	252	144,709	14,181.2	87
4013	Railroad switching & terminal services	332	75	40,385	3,957.6	89
SIC 41	**LOCAL & INTERURBAN PASSENGER TRANSIT**					
4111	Local & suburban transit	1,333	114	66,447	2,259.4	71
4119	Local passenger transportation n.e.c.	6,210	56	93,489	3,178.9	11
4121	Taxicabs	2,542	46	37,691	1,281.6	25
4131	Intercity and rural bus transportation	1,103	30	22,717	772.4	38
4141	Local bus charter service	650	10	10,142	344.9	18
4142	Nonlocal bus charter service	1,171	7	15,565	529.3	7
4151	School buses	2,066	68	49,652	1,688.3	26
4173	Bus terminal & service facilities	451	16	16,852	573.0	72

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SIC	Industry	Establishments Total	Establishments Large	Employment	Shipments Receipts ($Mil.)	% In Large Estab.
SIC 42	**TRUCKING & WAREHOUSING**					
4212	Local trucking without storage	46,247	198	318,728	19,111.9	16
4213	Trucking, except local	38,107	801	558,332	45,695.6	32
4214	Local trucking with storage	6,120	48	76,038	4,148.6	12
4215	Courier services except air	1,300	78	52,429	2,256.0	64
4221	Farm product warehousing & storage	1,894	9	13,553	1,027.9	12
4222	Refrigerated warehousing & storage	1,4111	47	31,451	2,073.3	50
4225	General warehousing & storage	13,556	489	279,269	19,486.0	55
4226	Special warehousing & storage n.e.c.	2,804	93	50,193	4,113.1	45
4231	Trucking terminal facilities	2,216	139	72,939	4,862.6	53
SIC 44	**WATER TRANSPORTATION**					
4412	Deep sea foreign transport of freight	439	39	18,136	3,808.6	69
4424	Deep sea domestic transport of freight	269	27	9,440	1,606.7	68
4432	Freight transport on the Great Lakes	33	1	745	113.3	23
4449	Water freight transportation n.e.c.	453	31	14,788	1,725.3	59
4481	Deep sea non-ferry passenger transport	79	16	12,459	927.8	92
4482	Ferries	96	9	4,619	360.5	74
4489	Water passenger transport n.e.c.	423	16	7,250	436.4	45
4491	Marine cargo handling	967	61	25,031	1,600.2	52
4492	Towing & tugboat services	956	41	19,402	1,448.0	38
4493	Marinas	3,904	6	25,463	2,012.1	11
4499	Water transportation services n.e.c.	1,507	18	16,641	990.8	31
SIC 45	**AIR TRANSPORTATION**					
4512	Scheduled air transportation	2,258	251	220,344	15,688.1	85
4513	Air courier services	886	54	41,082	2,925.0	57
4522	Nonscheduled air transportation	2,785	53	34,561	2,460.7	37
4581	Airports, flying fields & services	5,474	252	190,264	13,546.4	73
SIC 46	**PIPELINES, EXCEPT NATURAL GAS**					
4612	Crude petroleum pipelines	405	22	11,751	4,595.1	47
4613	Refined petroleum pipelines	321	11	5,889	2,302.8	40
4619	Pipelines n.e.c.	11	0	97	37.9	0
SIC 47	**TRANSPORTATION SERVICES**					
4724	Travel agencies	22,187	38	110,069	4,381.4	7
4725	Tour operators	1,744	16	14,142	902.2	23
4729	Passenger transport arrangement n.e.c.	1,046	36	19,670	1,344.1	55
4731	Arrangement of freight transportation	12,305	81	108,569	7,334.1	26
4741	Rental of railroad cars	157	5	2,194	218.4	40
4783	Packing & crating	904	18	11,068	848.5	27
4785	Toll roads etc. & freight inspection	290	15	8,313	474.5	73
4789	Transportation services n.e.c.	644	20	17,910	939.2	60
SIC 48	**COMMUNICATIONS**					
4812	Radiotelephone communications	1,576	75	45,126	4,799.7	55
4813	Nonradiotelephone communication	5,165	675	486,821	51,779.3	85
4822	Telegraph, electronic mail, etc.	797	26	16,277	1,170.3	66
4832	Radio broadcasting stations	7,137	84	129,355	5,529.2	13
4833	Television broadcasting stations	1,896	314	110,029	4,703.1	61
4841	Cable & other pay television services	5,195	276	119,130	6,701.1	52
4899	Communications services n.e.c.	1,050	58	38,693	4,537.2	75
SIC 49	**ELECTRIC, GAS & SANITARY SERVICES**					
4911	Electric services	5,266	817	468,895	129,500.4	77
4922	Natural gas transmission	1,003	48	39,711	10,371.1	57
4923	Gas transmission & distribution	732	57	31,534	8,235.6	62
4924	Natural gas distribution	1,437	140	62,949	16,440.1	66
4925	Gas production &/or distribution	550	9	9,562	2,497.3	44
4931	Electric & other services combined	557	97	53,960	11,151.7	78
4932	Gas & other services combined	162	24	9,484	1,960.0	74
4939	Combination utilities n.e.c.	179	19	8,875	1,834.2	70
4941	Water supply	4,279	88	78,940	5,250.9	46
4952	Sewerage systems	810	29	18,765	1,492.5	43
4953	Refuse systems	7,572	166	133,463	10,615.1	29
4959	Sanitary services n.e.c.	1,273	2	7,668	609.9	3
4961	Steam & air-conditioning supply	110	3	2,085	123.2	27
4971	Irrigation systems	556	7	7,293	450.7	19

FINANCE, INSURANCE & REAL ESTATE

SIC	Industry	Establishments Total	Establishments Large	Employment	Shipments Receipts ($Mil.)	% In Large Estab.
SIC 60	**DEPOSITORY INSTITUTIONS**					
6011	Federal reserve banks	37	34	15,730	999.9	99
6019	Central reserve depositories n.e.c.	23	3	1,039	66.0	74
6021	National commercial banks	22,323	666	704,369	44,772.5	51
6022	State commercial banks	24,082	457	546,511	34,738.4	33
6029	Commercial banks n.e.c.	1,449	35	35,925	2,283.5	41
6035	Federal savings institutions	11,212	291	224,788	14,288.4	34
6036	Nonfederal savings institutions	4,004	79	75,958	4,828.2	24
6061	Federally chartered credit unions	3,383	26	44,795	2,847.3	16
6062	Nonfederally chartered credit unions	3,006	23	45,351	2,882.7	33
6081	Branches & agencies of foreign banks	293	26	10,153	645.4	44
6082	Foreign-trade & -banking institutions	163	12	9,873	627.6	69
6091	Nondeposit trust facilities	82	6	1,905	121.1	44
6099	Functions related to depository banking	2,162	28	21,238	1,350.0	35

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SIC	Industry	Establishments Total	Establishments Large	Employment	Shipments Receipts ($Mil.)	% In Large Estab.
SIC 61	**NONDEPOSITORY CREDIT INSTITUTIONS**					
6111	Federal & federally-sponsored credit	1,154	67	37,881	3,246.9	63
6141	Personal credit institutions	10,121	127	117,305	10,054.7	44
6153	Short-term business credit	1,811	94	60,868	5,217.2	67
6159	Misc. business credit institutions	4,068	108	62,490	5,356.3	39
6162	Mortgage bankers & loan corresp.	8,250	231	138,836	11,900.2	39
6163	Loan brokers	4,576	11	31,643	2,712.2	9
SIC 62	**SECURITY & COMMODITY BROKERS**					
6211	Security brokers & dealers	13,675	331	325,635	26,923.5	49
6221	Commodity contracts brokers & dealers	2,108	29	20,511	1,695.8	25
6231	Security & commodity exchanges	320	16	8,995	743.7	69
6282	Investment advice	7,139	67	81,508	6,739.1	39
6289	Security & commodity services n.e.c.	715	22	11,995	991.7	56
SIC 63	**INSURANCE CARRIERS**					
6311	Life insurance	8,081	763	543,292	27,229.8	78
6321	Accident & health insurance	1,254	188	125,239	6,277.0	84
6324	Hospital & medical service plans	831	208	144,480	7,241.3	91
6331	Fire, marine & casualty insurance	4,503	848	507,646	25,443.2	86
6351	Surety insurance	888	62	40,401	2,024.9	72
6361	Title insurance	2,392	80	51,693	2,590.9	34
6371	Pension, health & welfare funds	962	61	32,635	1,635.7	65
6399	Insurance carriers n.e.c.	203	26	10,194	510.9	73
SIC 64	**INSURANCE AGENTS, BROKERS & SERVICE**					
6411	Insurance agents, brokers & service	99,658	640	635,592	49,096.9	26
SIC 65	**REAL ESTATE**					
6512	Operators of nonresidential buildings	59,261	161	236,027	27,370.2	20
6513	Operators of apartment buildings	45,613	145	199,845	23,174.4	13
6514	Operators of nonapartment dwellings	5,619	4	14,610	1,694.2	9
6515	Operators of mobile home sites	9,206	0	19,706	2,285.1	0
6517	Lessors of railroad property	26	1	409	47.4	78
6519	Lessors of real property n.e.c.	4,796	12	14,907	1,728.6	18
6531	Real estate agents & managers	109,293	273	598,655	69,421.2	9
6541	Title abstract offices	2,721	2	15,704	1,821.1	2
6552	Land subdividers & developers n.e.c.	32,990	165	178,586	20,709.2	18
6553	Cemetery subdividers & developers	3,185	11	21,784	2,526.1	8
SIC 67	**HOLDING & OTHER INVESTMENT OFFICES**					
6712	Offices of bank holding companies	917	52	34,000	2,776.7	66
6719	Offices of holding companies n.e.c.	6,875	67	45,578	3,722.3	51
6722	Open-end management investment	809	39	25,434	2,077.2	73
6726	Unit investment trusts	493	7	3,507	286.4	28
6732	Educational, religious, etc. trusts	989	15	8,904	727.2	39
6733	Trusts n.e.c.	1,034	17	10,537	860.5	43
6792	Oil royalty traders	1,532	4	4,239	346.2	14
6794	Patent owners & lessors	2,331	28	22,457	1,834.0	27
6798	Real estate investment trusts	3,151	15	18,149	1,482.2	42
6799	Investors n.e.c.	5,785	30	32,051	2,617.6	31

SERVICES

SIC	Industry	Establishments Total	Establishments Large	Employment	Shipments Receipts ($Mil.)	% In Large Estab.
SIC 70	**HOTELS & OTHER LODGING PLACES**					
7011	Hotels & motels	50,784	3,225	1,415,624	49,892.3	63
7021	Rooming & boarding houses	1,015	12	9,414	285.7	32
7032	Sporting & recreational camps	2,479	8	15,424	761.9	8
7033	Recreational vehicle parks & campsites	5,219	3	13,908	586.2	4
7041	Membership basis organization hotels	842	20	13,947	388.0	36
SIC 72	**PERSONAL SERVICES**					
7211	Power laundries, family & commercial	2,935	41	33,487	757.6	18
7212	Garment pressing & cleaners' agents	7,554	2	28,127	776.0	1
7213	Linen supply	1,598	219	71,965	2,893.6	48
7215	Coin-operated laundries & drycleaning	13,749	10	44,466	1,168.3	5
7216	Drycleaning plants, except rugs	19,941	28	129,492	3,208.4	6
7217	Carpet & upholstery cleaning	10,199	12	44,756	1,328.7	4
7218	Industrial launderers	826	106	33,392	1,345.6	48
7219	Laundry & garment services n.e.c.	4,047	11	16,306	343.6	10
7221	Photographic portrait studios	12,696	34	54,238	1,931.1	22
7231	Beauty shops	105,233	16	401,716	7,016.0	1
7241	Barber shops	19,440	1	42,777	762.7	0
7251	Shoe repair shops & shoeshine parlors	6,396	0	8,320	213.7	0
7261	Funeral service & crematories	18,532	15	89,416	5,101.6	3
7291	Tax return preparation services	5,408	30	29,824	690.0	22
7299	Misc. personal services n.e.c.	11,606	86	80,399	3,051.6	26
SIC 73	**BUSINESS SERVICES**					
7311	Advertising agencies	20,582	132	140,915	18,765.5	27
7312	Outdoor advertising services	1,397	3	9,560	758.3	8
7313	Radio, TV & publishers' representatives	1,348	17	15,602	1,724.0	48
7319	Advertising n.e.c.	1,553	14	17,185	1,288.9	44
7322	Adjustment & collection services	4,700	34	53,241	2,366.2	16
7323	Credit reporting services	1,518	51	29,647	1,632.6	45

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SIC	Industry	Establishments Total	Establishments Large	Employment	Shipments Receipts ($Mil.)	% In Large Estab.
7331	Direct mail advertising services	4,192	137	85,841	4,475.7	53
7334	Photocopying & duplicating services	4,905	10	26,680	1,401.6	6
7335	Commercial photography	8,058	6	22,709	1,269.6	7
7336	Commercial art & graphic design	15,828	17	54,930	3,763.0	6
7338	Secretarial & court reporting services	5,194	5	19,896	725.2	3
7342	Disinfecting & pest control services	10,249	11	70,252	2,270.4	4
7349	Building maintenance services n.e.c.	27,474	1,275	639,685	13,163.4	61
7352	Medical equipment rental & leasing	2,360	6	16,314	1,290.2	9
7353	Heavy construction equipment rental	5,351	13	34,281	3,174.1	5
7359	Equipment rental & leasing n.e.c.	26,028	41	136,566	10,280.3	6
7361	Employment agencies	12,201	332	206,919	12,415.1	54
7363	Help supply services	7,357	573	270,325	13,516.3	76
7371	Computer programming services	9,780	98	118,794	10,645.7	23
7372	Prepackaged software	7,659	119	103,280	9,355.7	32
7373	Computer integrated systems design	3,771	94	68,589	8,477.5	40
7374	Computer processing & data preparation	7,902	341	204,376	12,097.6	49
7375	Information retrieval services	425	17	13,261	1,210.7	62
7376	Computer facilities management services	478	9	6,421	365.6	37
7377	Computer rental & leasing	1,366	11	13,336	11,667.0	21
7378	Computer maintenance & repair	2,970	37	36,508	2,849.9	26
7379	Computer services n.e.c.	8,641	35	72,791	5,559.8	17
7381	Detective and armored car services	7,237	756	271,669	5,576.5	63
7382	Security systems services	1,493	81	35,165	1,853.8	60
7383	News syndicates	522	13	7,615	525.1	42
7384	Photofinishing laboratories	10,294	82	61,677	3,015.9	27
7389	Business services n.e.c.	81,632	636	593,120	29,656.0	37
SIC 75	**AUTO REPAIR, SERVICES & PARKING**					
7513	Truck rental & leasing	6,860	41	54,847	6,306.7	18
7514	Passenger car rental	6,571	63	58,231	6,064.6	25
7515	Passenger car leasing	2,807	17	16,478	3,499.9	18
7519	Utility trailer rental	1,290	5	6,784	567.3	18
7521	Automobile parking	2,266	56	31,981	1,630.1	34
7532	Top & body repair & paint shops	40,846	11	147,408	7,217.1	1
7533	Automotive exhaust system repair shops	3,564	1	11,287	711.6	1
7534	Tire retreading & repair shops	2,237	3	12,811	912.0	13
7536	Automotive glass replacement shops	2,752	1	10,003	585.1	2
7537	Automotive transmission repair shops	4,661	0	16,416	871.1	0
7538	General automotive repair shops	72,680	31	225,601	11,678.0	3
7539	Automotive repair shops n.e.c.	23,369	13	79,170	4,073.4	4
7542	Carwashes	8,761	9	59,160	1,955.7	2
7549	Automotive services, except repair	9,135	21	63,180	2,801.6	25
SIC 76	**MISCELLANEOUS REPAIR**					
7622	Radio & television repair shops	19,068	4	37,056	1,183.1	2
7623	Refrigeration service & repair	8,648	2	19,049	936.1	1
7629	Electrical & electronic repair shops n.e.c.	17,815	46	59,648	2,403.5	23
7631	Watch, clock & jewelry repair	2,995	4	7,804	250.1	6
7641	Reupholstery & furniture repair	13,601	0	24,902	672.4	0
7692	Welding repair	10,468	2	25,495	1,055.0	1
7694	Armature rewinding shops	2,975	7	15,529	809.0	6
7699	Repair services n.e.c.	56,487	71	173,894	7,853.4	10
SIC 78	**MOTION PICTURES**					
7812	Motion picture & video tape production	10,371	112	105,539	12,086.1	41
7819	Services allied to motion pictures	2,377	41	26,137	2,249.5	35
7822	Motion picture & video tape distribution	1,261	11	11,214	1,651.8	14
7829	Motion picture distribution services	213	3	2,081	132.7	30
7832	Non-drive-in motion picture theaters	2,682	27	34,920	1,040.6	21
7833	Drive-in motion picture theaters	411	1	2,642	81.1	5
7841	Video tape rental	12,400	9	57,651	2,038.1	3
SIC 79	**AMUSEMENT & RECREATION**					
7911	Dance studios, schools & halls	4,315	5	19,964	409.6	3
7922	Theatrical producers & services	4,922	97	57,737	4,688.6	34
7929	Entertainers & entertainment groups	3,016	63	30,546	1,389.1	31
7933	Bowling centers	6,585	13	85,049	2,991.7	2
7941	Professional sports clubs & promoters	1,122	48	21,858	2,068.9	45
7948	Racing, including track operation	1,542	67	33,127	2,366.2	68
7991	Physical fitness facilities	6,759	47	70,498	1,831.4	12
7992	Public golf courses	3,512	18	33,342	2,016.2	12
7993	Coin-operated amusement devices	3,653	37	48,318	2,851.9	64
7996	Amusement parks	1,141	42	64,755	4,856.6	85
7997	Membership sports & recreation clubs	12,571	224	1,219,095	7,743.5	16
7999	Amusement & recreation services n.e.c.	19,455	207	192,383	8,961.8	43
SIC 80	**HEALTH**					
8011	Offices & clinics of medical doctors	131,418	755	1,111,377	79,101.1	22
8021	Offices & clinics of dentists	69,416	15	348,972	15,758.2	1
8031	Offices of osteopathic physicians	4,078	2	21,287	951.5	4
8041	Offices & clinics of chiropractors	15,816	1	52,347	2,579.0	0
8042	Offices & clinics of optometrists	10,335	4	43,306	2,272.6	2
8043	Offices & clinics of podiatrists	2,491	0	9,661	528.3	0
8049	Offices of health practitioners n.e.c.	7,770	72	55,403	2,443.4	24
8051	Skilled nursing care facilities	9,328	3,460	875,685	18,650.3	67
8052	Intermediate care facilities	1,733	264	103,551	1,910.3	42

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SIC	Industry	Establishments Total	Establishments Large	Employment	Shipments Receipts ($Mil.)	% In Large Estab.
8059	Nursing & personal care facilities n.e.c.	5,694	1,242	362,350	8,040.9	56
8062	General medical & surgical hospitals	7,021	5,009	3,966,254	189,309.3	98
8063	Psychiatric hospitals	1,120	623	306,881	13,286.4	95
8069	Specialty hospitals, except psychiatric	1,149	337	218,265	10,927.2	91
8071	Medical laboratories	5,624	160	99,250	6,063.6	46
8072	Dental laboratories	7,385	5	32,860	1,246.0	3
8082	Home health care services	2,881	376	148,059	3,914.8	66
8092	Kidney dialysis centers	432	3	9,521	616.8	5
8093	Specialty outpatient clinics n.e.c	6,132	153	148,661	5,582.8	33
8099	Health & allied services n.e.c.	2,603	98	50,466	2,304.2	37
SIC 81	**LEGAL SERVICES**					
8111	Legal services	102,199	863	828,594	50,739.0	24
SIC 82	**EDUCATION**					
8211	Elementary & secondary schools	102,125	10,445	5,652,778	176,711.5	44
8221	Colleges & universities	3,958	1,827	1,898,473	99,404.0	97
8222	Junior colleges & technical institutes	1,520	765	310,543	12,306.8	91
8231	Libraries	14,974	177	140,006	3,559.7	36
8243	Data processing schools	794	13	11,617	685.6	24
8244	Business & secretarial schools	943	34	26,645	1,066.8	25
8249	Vocational schools n.e.c.	4,358	217	109,777	5,234.8	45
8299	Schools & educational services n.e.c.	9,455	162	108,971	3,680.7	35
SIC 83	**SOCIAL SERVICES**					
8322	Individual & family social services	26,451	383	338,545	9,763.3	26
8331	Job training & related services	3,784	419	156,516	3,912.9	55
8351	Child day care services	53,966	86	342,347	4,830.2	5
8361	Residential care	8,287	703	305,144	7,785.4	57
8399	Social services n.e.c.	7,471	261	144,065	10,578.5	40
SIC 84	**MUSEUMS, BOTANICAL GARDENS & ZOOS**					
8412	Museums & art galleries	3,874	95	58,274	2,575.8	42
8422	Botanical & zoological gardens	244	25	8,772	375.6	57
SIC 86	**MEMBERSHIP ORGANIZATIONS**					
8611	Business associations	12,823	61	86,923	6,341.9	18
8621	Professional membership organizations	4,169	72	49,166	3,672.9	36
8631	Labor organizations	9,215	176	133,013	2,701.8	51
8641	Civic, social & fraternal associations	25,291	363	323,832	10,362.6	30
8651	Political organizations	700	6	5,666	335.4	16
8661	Religious organizations	88,672	538	689,138	22,727.8	17
8699	Membership organizations n.e.c.	5,432	134	83,067	4,331.5	35
SIC 87	**ENGINEERING & MANAGEMENT SERVICES**					
8711	Engineering services	37,668	770	587,917	38,573.8	44
8712	Architectural services	15,109	116	134,345	8,777.7	16
8713	Surveying services	3,598	3	24,923	895.6	2
8721	Accounting, auditing & bookkeeping	48,254	517	443,133	17,982.3	42
8731	Commercial physical research	5,944	153	118,785	9,811.3	48
8732	Commercial nonphysical research	8,278	44	77,057	5,616.7	15
8733	Noncommercial research organizations	3,299	84	79,363	5,741.0	52
8734	Testing laboratories	3,728	34	54,755	2,983.5	24
8741	Management services	16,350	418	243,898	25,916.1	59
8742	Management consulting services	33,284	139	153,402	11,021.5	26
8743	Public relations services	7,521	55	61,174	4,819.6	49
8744	Facilities support management services	184	26	9,748	785.9	76
8748	Business consulting services n.e.c.	17,867	77	85,824	7,135.6	28
SIC 89	**MISCELLANEOUS SERVICES**					
8999	Services n.e.c.	6,419	45	46,976	2,280.0	44